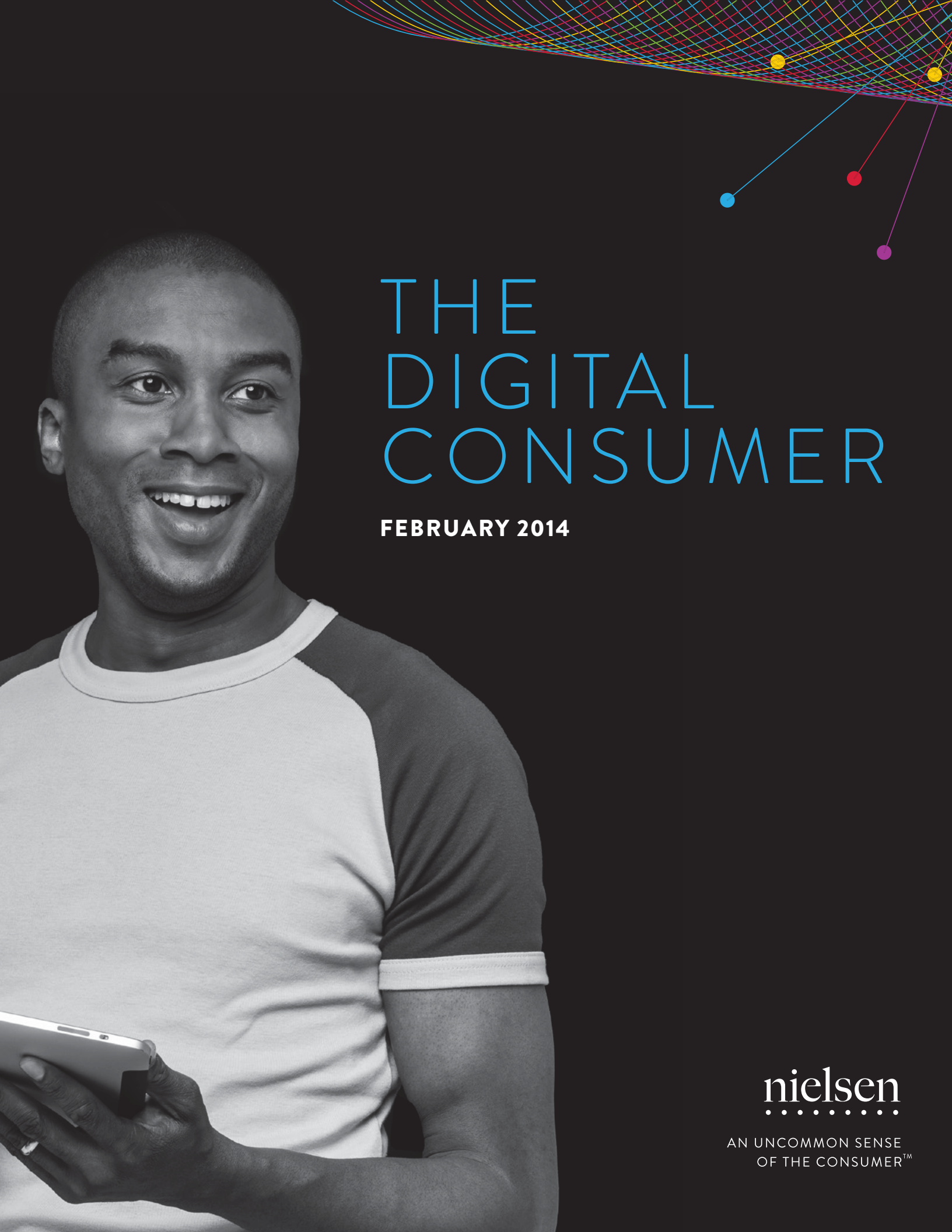

THE DIGITAL CONSUMER

FEBRUARY 2014

nielsen

AN UNCOMMON SENSE OF THE CONSUMER™

MEET TODAY'S DIGITAL CONSUMER

For most American consumers, their everyday lives and their digital lives are now wholly intertwined. So much so that in 2013, the Oxford Dictionary officially codified the term *digital detox* – "a period of time during which a person refrains from using electronic devices such as smartphones or computers..." – by adding it and the definition to its online version (which, ironically, is accessible only via a digital device.)

Today's consumer is more connected than ever, with more access to and deeper engagement with content and brands, thanks to the proliferation of digital devices and platforms. Content that was once only available to consumers via specific methods of delivery (such as via print, radio and broadcast television) can now be sourced and delivered to consumers through their multiple connected devices. This is driving the media revolution and blurring traditional media definitions.

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WHAT'S POWERING THE NEW DIGITAL REALITY?

DEVICE OWNERSHIP = EMPOWERMENT

To put it simply, today's consumer has a lot of digital devices. A majority of U.S. households now own high-definition televisions (HDTVs), Internet-connected computers and smartphones, and they spend an average of 60 hours a week consuming content across multiple screens. **In addition to more devices, consumers now have more choices for how and when they access content**, such as broadband-only delivery of programming and DVRs for time-shifted viewing.

In particular, **the ownership of mobile devices is revolutionizing the consumer shopping experience**. Increasingly, consumers are relying on mobile devices to research potential purchases and compare prices for goods and services. As U.S. consumers continue to take advantage of the convenience of anytime, anywhere browsing and shopping via their smartphones and tablets, there is a huge opportunity for retailers and brands to capture the full path-to-purchase.

THE DIGITAL LIVING ROOM

The rapid adoption of a second screen has transformed the traditional TV viewing experience. Consumers are using smartphones and tablets in ways that are natural extensions of the programming they watch, like looking up information about the characters and plot lines, or researching and purchasing products and services advertised just minutes before. Using social media to engage with other viewers has also transformed the live viewing experience for millions of consumers across the country.

ALL SOCIAL, ALL THE TIME

Social media usage is now standard practice in our daily lives. Almost two-thirds (64%) of overall social media users say they use social media sites at least once a day via their computer, and **almost half (47%) of smartphone owners visit social networks every day**. With the rapid adoption of mobile devices, social media has a symbiotic relationship with the mobile consumer. And social has played a pivotal role, empowering consumers by providing a direct point of contact with the brands they use and the content they access.

HISPANIC CONSUMERS ARE DIGITAL TRAILBLAZERS

In the U.S., Hispanics make up the fastest growing population segment and Nielsen expects this group to contribute to 60 percent of the U.S. population growth in the next three years. They spend more time consuming digital video than the national U.S. average, and they are adopting smartphones at a much quicker rate. As an important and growing consumer segment, **Hispanic digital consumers are poised to be even more influential in the coming years.**

CONNECTING THE DIGITAL DOTS GETS YOU CLOSER TO TOMORROW'S CONSUMER

It has never been a more important time to know how consumers are behaving than in today's fast evolving digital environment. More than ever we need a clear view of what is happening today and the implications for the coming years. **Nielsen's 2014 Digital Consumer Report provides insight into what is propelling the new multiscreen, always connected consumer lifestyle.**

In the following pages, you'll get a detailed snapshot of the dynamic growth of mobile engagement, get familiar with the rapid uptake of device ownership and learn how this technology is changing the way consumers shop, access content and connect – **so you can keep pace with today's consumer and plan for tomorrow.**

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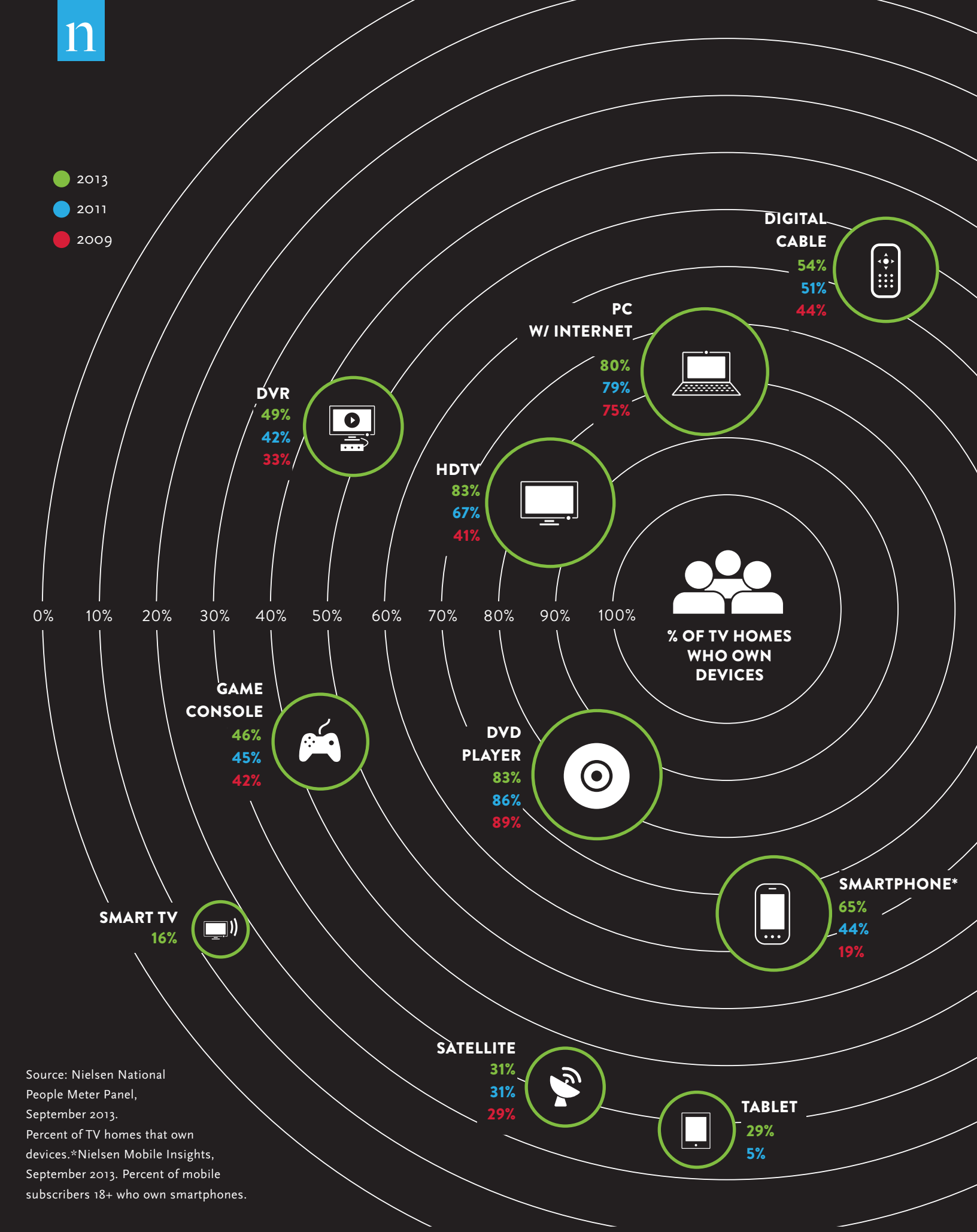
A LOOK AT THE MEDIA UNIVERSE

Not only do consumers have more devices to choose from, but they own more devices than ever. In 2013, **Americans on average own four digital devices** and ownership of many digital, mobile and connected devices has reached critical mass. When looking at the average American household, HDTVs (83%), Internet-connected computers (80%) and smartphones (65%) are in a majority of households, with a near majority for digital video recorders (49%) and gaming consoles (46%).

As a result of the explosion in digital and mobile device ownership, **American consumers are connected with screens throughout the day and engage with media content for more than 60 hours per week**. TV remains at the center of consumer media consumption. However, increases in time-shifted viewing and streaming video through a PC or smartphone show that consumers are increasingly comfortable accessing content whenever and wherever they want.



Source: Nielsen National People Meter Panel, September 2013. Percent of TV homes that own devices.*Nielsen Mobile Insights, September 2013. Percent of mobile subscribers 18+ who own smartphones.

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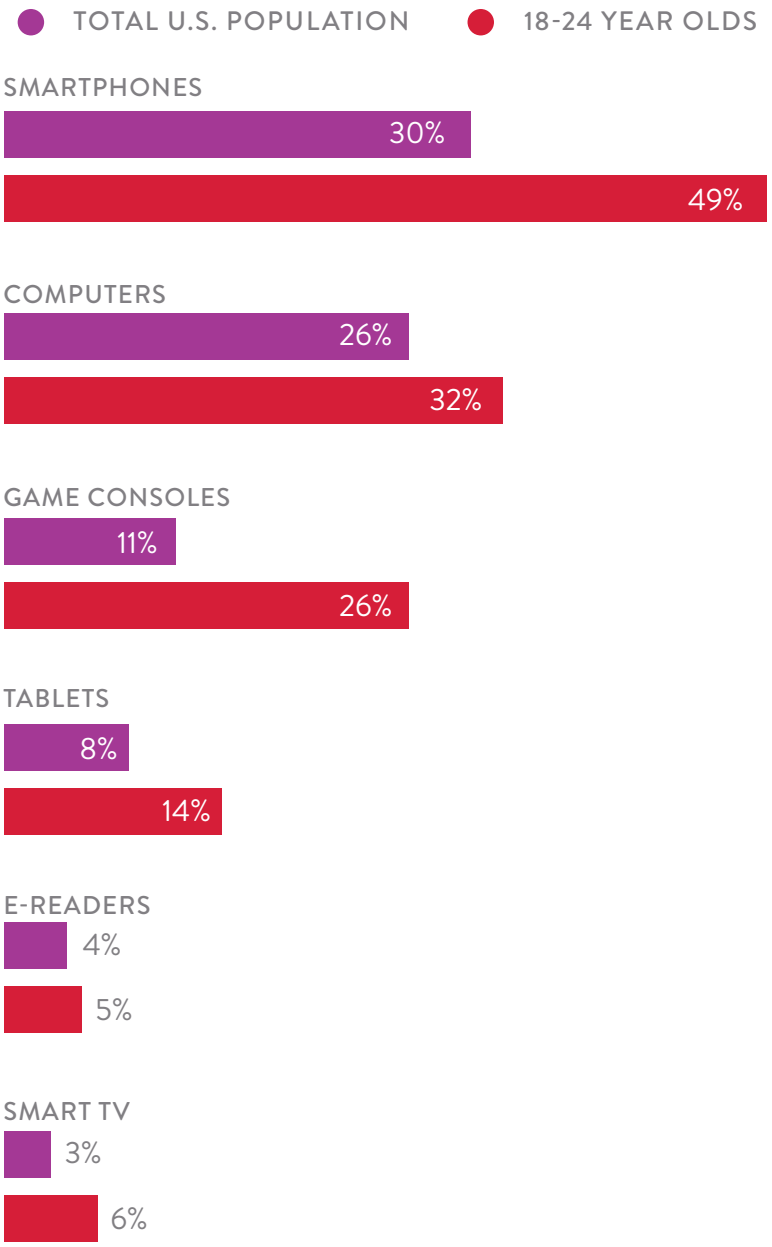
LOOKING FORWARD

WHAT GADGETS WE PLAN TO UPGRADE IN THE NEXT SIX MONTHS



Source: Nielsen U.S. Social Media Survey, 2013

1/4

OF AMERICANS SAID THEY PLAN TO BUY A SMARTPHONE

49%

HALF (49%) AGED 18-24 PLAN TO UPGRADE A SMARTPHONE

2X

MEN ARE TWICE AS LIKELY TO BUY A GAME CONSOLE COMPARED TO WOMEN

WHAT ARE YOU LOOKING AT?

Consumers today spend less time engaging with live content via traditional TV compared with the same time a year ago. **However consumption of TV content has increased thanks to a significant rise in hours watching timeshifted TV.** When looking at Q2, 2013 compared with the same quarter five years prior, computer-based video consumption is up 157 percent, mobile users are spending 59 percent more time watching video on their mobile devices. Indicating that consumers are embracing opportunities to engage with content when and where they want.

DID YOU KNOW?

SMARTPHONE OWNERS SPEND 86% OF THEIR TIME USING APPS VS. THE MOBILE WEB (14%)

Source: Nielsen Cross Platform Report, Q2 2013 , Nielsen Mobile NetView, July 2013

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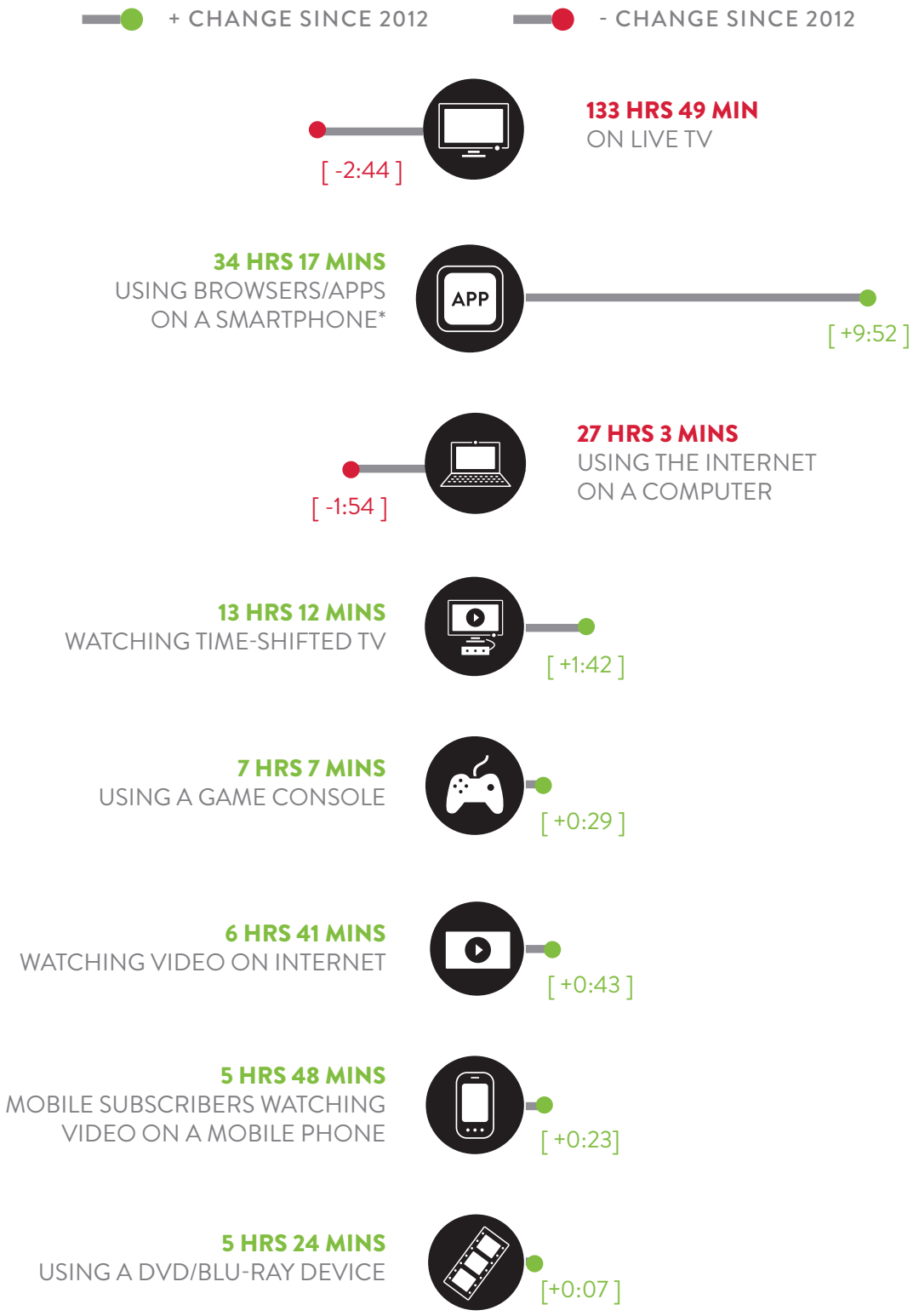
HOW CONSUMERS SPEND MEDIA TIME (HH:MM) EACH MONTH



Sources: Nielsen Cross Platform Report, Table 3 - Monthly Time Spent by Medium, Q3 2013.

*Nielsen, Mobile NetView 3.0, Q3 2013. Average of total minutes per person each month using apps and mobile web on smartphones.

WHAT DO BROADBAND-ONLY HOUSEHOLDS LOOK LIKE?

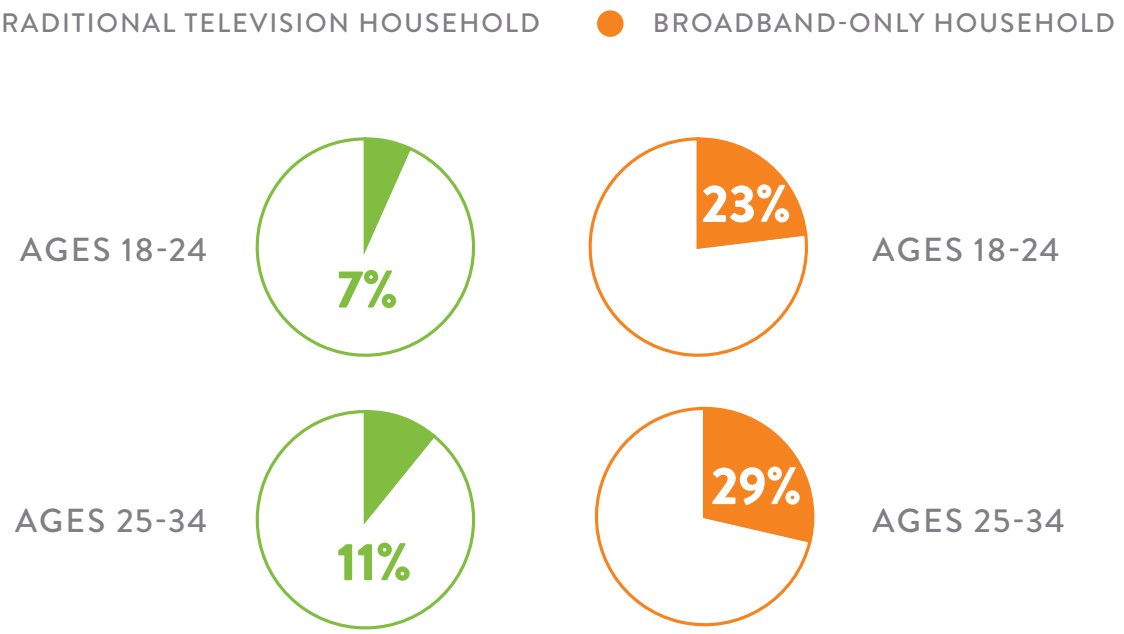
A small but growing group of consumers are opting for broadband connections and connected devices as their primary source for watching video at home. In particular, more than half (52%) of broadband-only homes skew towards younger demographics (18-34) compared to traditional TV households.

Compared to traditional TV households, broadband-only homes are twice as likely to own game consoles (80%) and own tablets (41%). While this group makes up less than one in 20 households, they have doubled in number over the last few years, marking these early adopters key to understanding how the living room will evolve in the future.

80%

OF BROADBAND-ONLY HOUSEHOLDS OWN GAME CONSOLES

DISTRIBUTION OF PERSONS VIEWING



Source: NPOWER, Share of P2+ PUT, 9/28 – 10/20/13, Total Day

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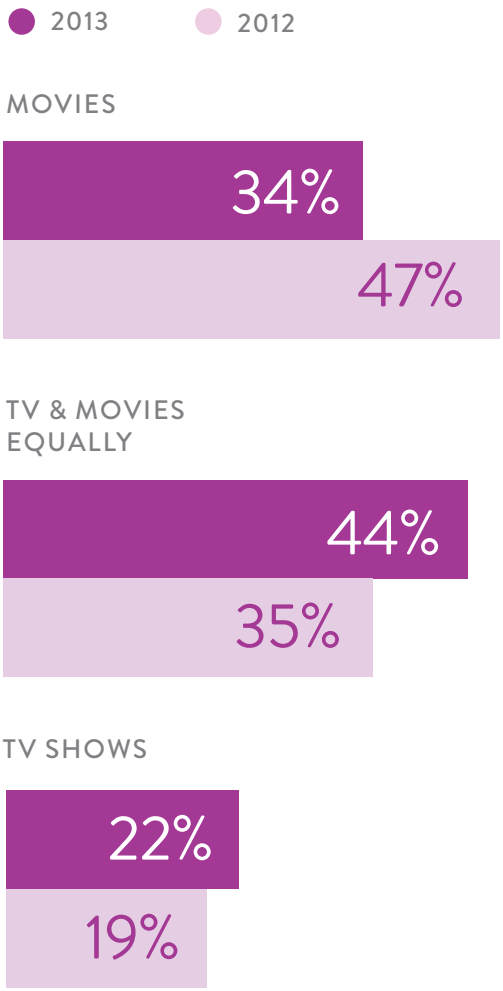
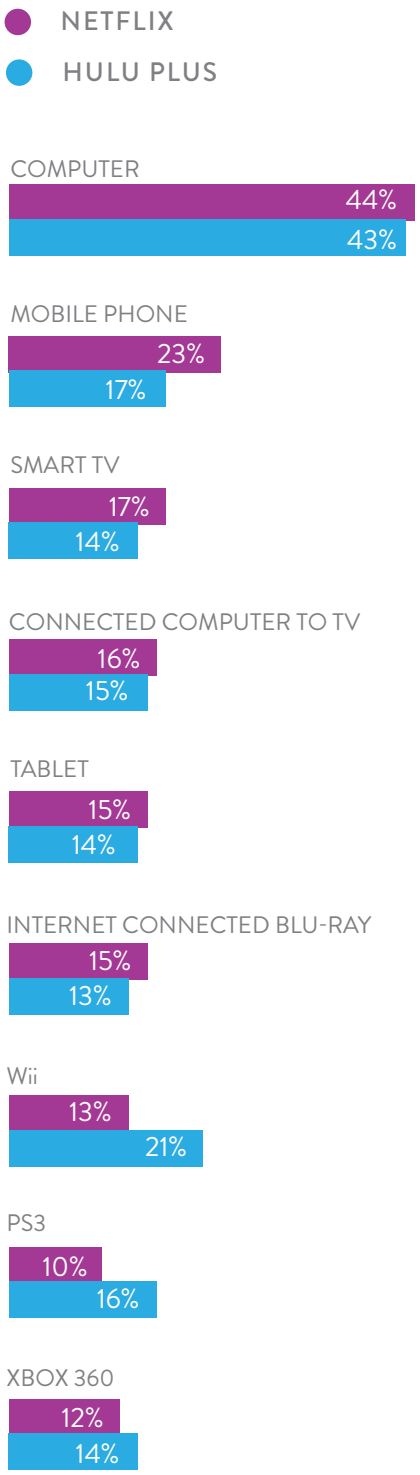
THE NEW STREAMING ENVIRONMENT

How consumers watch video is changing with the adoption of new devices. Already, **38 percent of U.S. consumers say they subscribe or use Netflix to stream video**, up from 31 percent in 2012. Netflix users are streaming across new screens including Smart TV (17%), tablets (15%), and directly on their computer (44%). And streaming video is growing outside of the home as well, with **23 percent of Netflix users saying they watch on mobile phones, up from just 11 percent in 2012**.

CONTENT NETFLIX USERS WATCH



HOW ARE NETFLIX AND HULU USERS STREAMING?



Source: Nielsen Over-the-Top Video Analysis, July 2013

CONSUMER SPOTLIGHT

HISPANICS ARE AHEAD OF THE DIGITAL CURVE

Hispanic consumers have rapidly adopted multiple-screens into their daily video viewing routines and represent 47 million traditional TV viewers in the U.S. and growing. They spend more time viewing video on digital devices, **with the average Latino spending more than eight hours watching online video each month**, which is over 90 minutes longer than the U.S. average.

Hispanics are adopting smartphones at a higher rate than any other demographic group: nearly three in four Latinos own smartphones (72%), close to 10 percent higher than average in the U.S.. It's little surprise that **10 million watch video on their mobile phones for an average of more than six hours per month**.

16%

DATA USAGE IS 16% HIGHER AMONG HISPANICS COMPARED WITH THE NATIONAL AVERAGE

49%

OF LATINO RESPONDENTS SAID THEY PLANNED TO REPLACE OR UPGRADE SMARTPHONES WITHIN THE NEXT SIX MONTHS

2X

HISPANICS ARE TWICE AS LIKELY TO UPGRADE THEIR TABLETS (15%) IN THE NEXT SIX MONTHS

Sources: Nielsen Cross Platform Report, Table 2 - Overall Usage by Medium, Q3 2013.
Nielsen Mobile Insights, Q3 2013.
Nielsen Bill Panel, Q3 2013.
Nielsen U.S. Social Media Survey, 2013.

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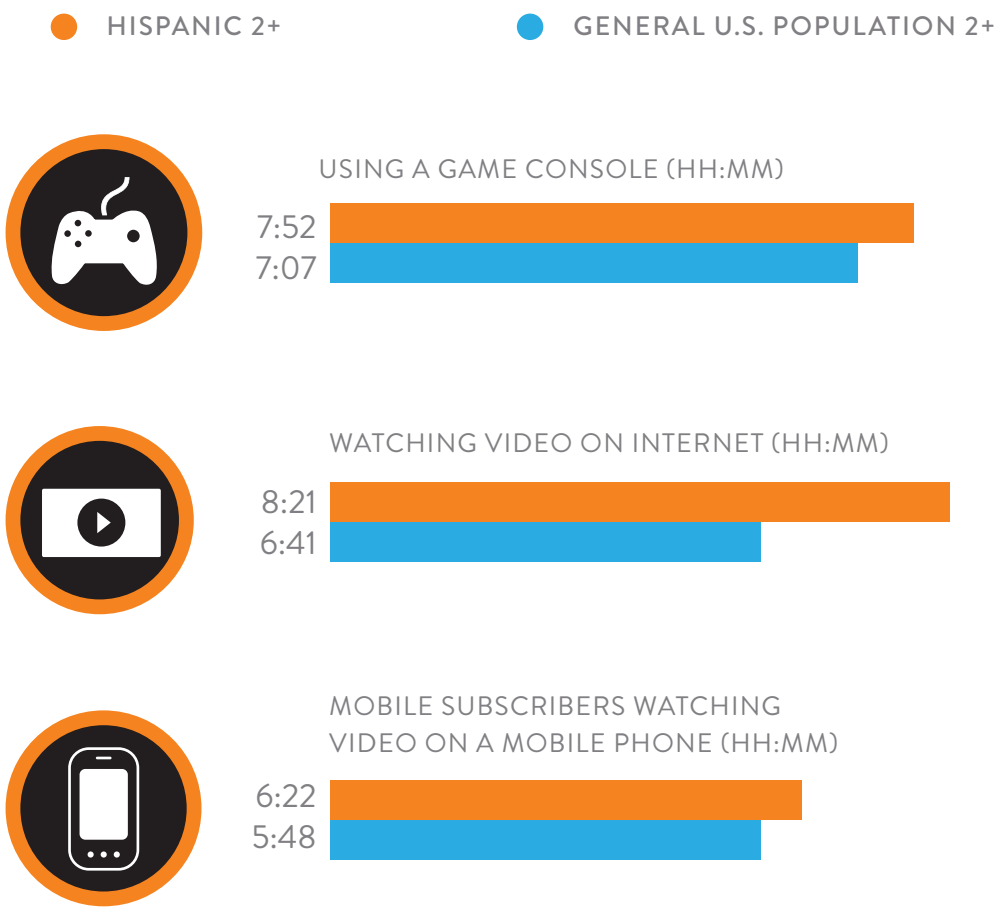
15 PERCENT OF AMERICA'S ADULT POPULATION ARE HISPANICS AND GROWING*...

12%
OF MOBILE SHOPPERS ARE HISPANIC

1 IN 5
SOCIAL MEDIA USERS VIA MOBILE APPS ARE HISPANIC

COMPARING MONTHLY TIME SPENT BY HISPANIC CONSUMERS VERSUS THE TOTAL U.S. POPULATION



* Source: 2013 U.S. Census Bureau

Sources: Nielsen Mobile Shopping Report, Q3 2013; Nielsen Cross Platform Report, Table 3 - Monthly Time Spent by Medium, Q3 2013; Nielsen Mobile NetView, July 2013;

THE NEW TWO-SCREEN MINIMUM

Connected devices such as smartphones and tablets have become constant companions to consumers on the go and in the home. **Eighty-four percent of smartphone and tablet owners say they use their devices as second-screens while watching TV at the same time.** When using connected devices simultaneously, opportunities exist to deepen consumer engagement with content on the primary screen.

As shown on the following page, **consumers are more likely to reach for a tablet than a mobile phone as the second screen,** with the exception of email / texting friends about the program.

Source: Nielsen Connected Devices Report, Q3 2013.

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CONNECTED DEVICE OWNERS USAGE WHILE WATCHING TV

Source: Nielsen Connected Devices Report, Q3 2013.

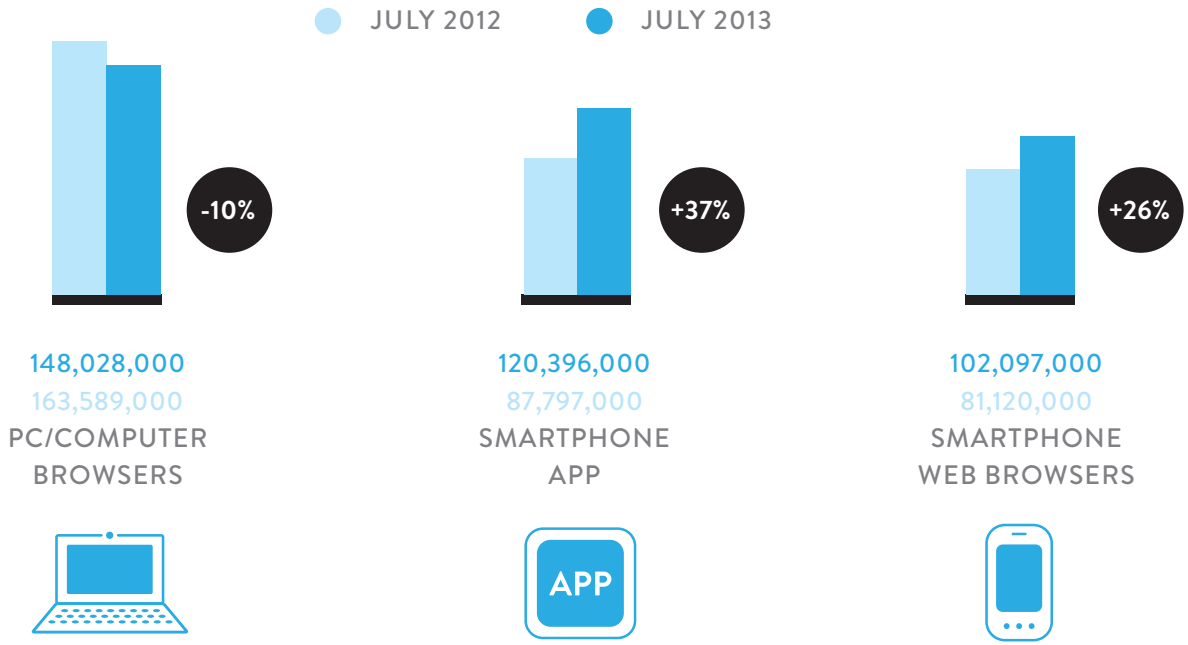
THE NEW SOCIAL NORM

Social media usage continues to grow as the need to stay connected with social networks becomes ingrained into the daily lives of consumers. **Almost two-thirds (64%) of social media users say they use social media sites at least once a day via their computer.**

But, increasingly, consumers are reaching for their smartphones over traditional computers to access social networks. **Almost half (47%) of smartphone owners visited social networks every day and in the last year,** and the unique audience for social media smartphone apps increased 37 percent.

As digital consumers find their own mix of devices and platforms to access and engage with social media, they are building profiles and connections on multiple social networks as well. **While Facebook remains the largest social network in both the Web and mobile**, consumers are embracing other social platforms such as LinkedIn (up 37% among users), Pinterest (triple unique users on smartphone apps), and Instagram (nearly double the number of unique users in 2013).

UNIQUE AUDIENCE OF SOCIAL MEDIA WEBSITES AND APPS BY PLATFORM



Sources: Nielsen NetView, July 2013. Nielsen Mobile NetView, July 2013.

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WHERE WE GET SOCIAL

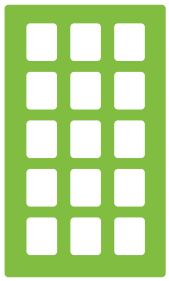
While the home remains the most prevalent location for logging onto social media sites, today's constantly connected consumers are active on social media sites anywhere they go. **Two in five (39%) Americans get digitally social while at work, and one in five (21%) have logged onto social sites while in the bathroom in the past 30 days.**

WHERE WE USE SOCIAL MEDIA ALSO DEPENDS ON WHO IS USING IT

IN THE CAR

48%

of moms with kids under 13 years-old are using social media in the car vs. 31 percent overall.



IN THE OFFICE

1/2

Half of adults ages 25-34 use social media at work (56%), and wealthier households ($150k+) are the most likely to network in the office (57%), vs. only one-third (35%) overall.

AT A RESTAURANT

44%

of young adults ages (25-34) social network around the restaurant table vs. 31 percent overall.

IN THE BATHROOM

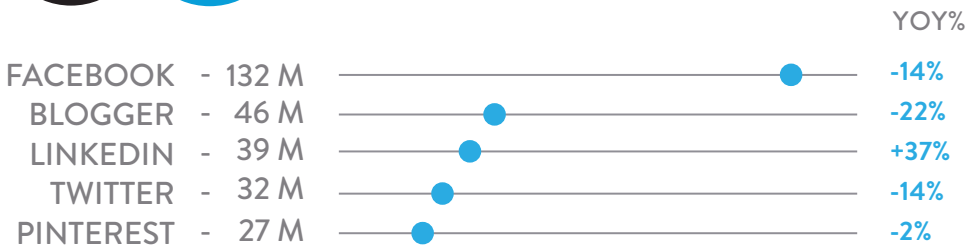
2X

Young adults ages 18-24 are twice as likely (40%) to use social media in the bathroom compared to the average (21%).

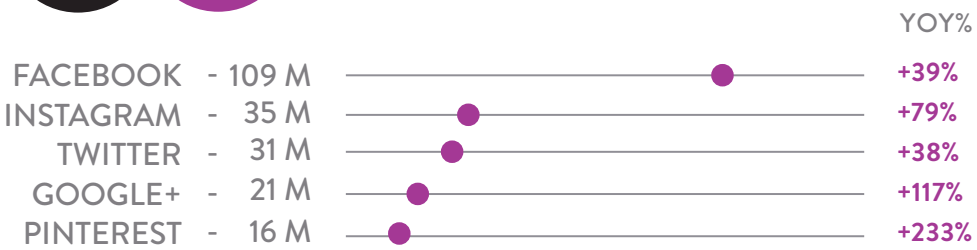
Source: Nielsen U.S. Social Media Survey, 2013.

WHAT SOCIAL NETWORKS DO WE USE?

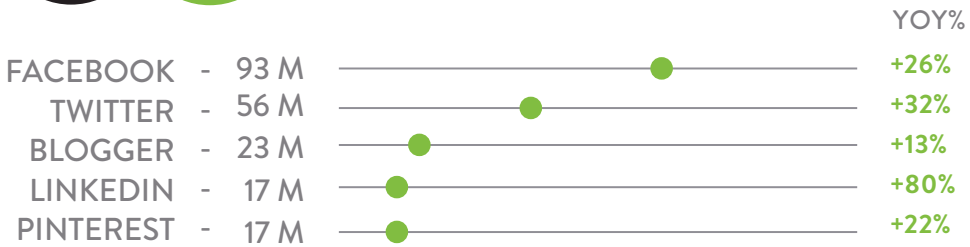
MONTHLY SOCIAL MEDIA UNIQUE AUDIENCE ON COMPUTERS (IN MILLIONS)



MONTHLY SOCIAL MEDIA UNIQUE AUDIENCE ON SMARTPHONE APPS (IN MILLIONS)



MONTHLY SOCIAL MEDIA UNIQUE AUDIENCE ON SMARTPHONE BROWSERS (IN MILLIONS)



Sources: Nielsen NetView, July 2013. Nielsen Mobile NetView, July 2013.

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MONTHLY TIME SPENT ON SOCIAL NETWORKS (HH:MM)

MONTHLY SOCIAL MEDIA TIME SPENT
PER PERSON ON COMPUTERS (HH:MM)

MONTHLY SOCIAL MEDIA TIME SPENT
PER PERSON ON SMARTPHONE APPS (HH:MM)

MONTHLY SOCIAL MEDIA TIME SPENT
PER PERSON ON SMARTPHONE BROWSERS (HH:MM)

Sources: Nielsen NetView, July 2013. Nielsen Mobile NetView, July 2013.

TREND SPOTLIGHT: SOCIAL TV

Regardless of which platform is used, social media is truly part of our lives and increasingly part of living room routines as we're watching TV. **On an average day, roughly one million Americans turn to Twitter to discuss TV**, and those tweets are read 11 million unique users on Twitter.

So what TV programs are generating the most social engagement? Here are the most social TV series on Twitter in Fall 2013.

NIELSEN TWITTER TV RATINGS: TOP 10 SERIES PROGRAMS BY AVERAGE UNIQUE AUDIENCE*

	NETWORK	PROGRAM	AVERAGE UNIQUE AUDIENCE
1	AMC	Breaking Bad	6.0M
2	AMC	The Walking Dead	4.9M
3	FX	American Horror Story: Coven	2.9M
4	ABC	Scandal	2.3M
5	ABC	Dancing With the Stars	2.2M
6	NBC	The Voice	2.1M
7	FOX	Glee	2.0M
8	FOX	The X Factor	1.8M
9	MTV	Catfish: The TV Show	1.8M
10	MTV	Awkward.	1.5M

9.1M

OVER 9.1 MILLION PEOPLE SAW ONE OR MORE OF THE 1.2 MILLION TWEETS SENT ABOUT THE BREAKING BAD SERIES FINALE

10.2M

OVER 10.2 MILLION PEOPLE VIEWED APPROXIMATELY 30 TWEETS ON AVERAGE EACH ABOUT THE 2013 AMERICAN MUSIC AWARDS

MOST TWEETED PROGRAM TYPES, 2013

TWEETS

492M SPORTS EVENT
338M SERIES
106M SPECIAL
42M FEATURE FILM
29M OTHER**

Source: Nielsen SocialGuide (Data from 9/1/2013 - 11/30/2013)
*The earliest date that Nielsen Twitter TV Ratings are available for is 9/1/13. Sports events are not included.
** Other includes: Sports non-event, TV Movie, Miniseries, Paid Programming, Short Film

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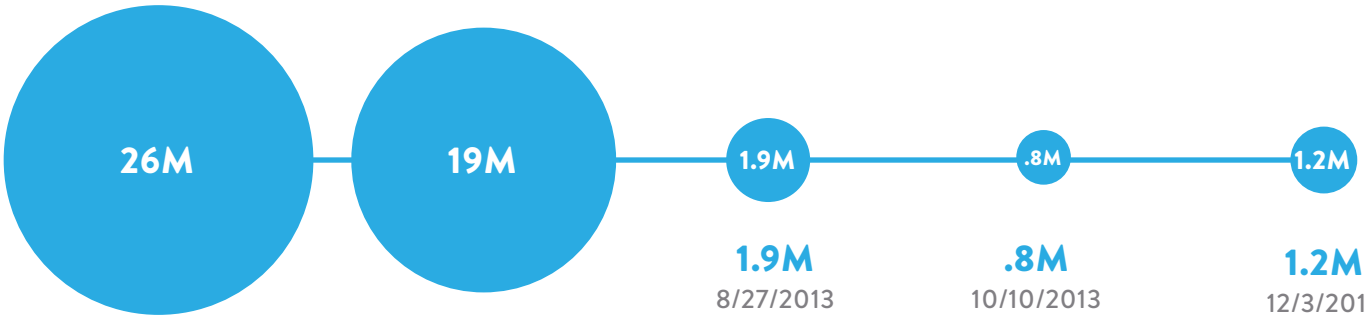
TOP FIVE MOST TWEETED SERIES GENRES, 2013

TWEETS

110M	REALITY
85M	DRAMA
43M	MUSIC
43M	COMEDY
33M	SITCOM

TOP TWEETED EPISODES / EVENTS BY PROGRAM TYPE (TOTAL TWEETS)



26M
2/3/2013
SUPER BOWL XLVII
NETWORK: CBS
SPORTS EVENT

19M
8/25/2013
2013 MTV VIDEO MUSIC AWARDS
NETWORK: MTV
SPECIAL

1.9M
8/27/2013
PRETTY LITTLE LIARS
NETWORK: ABC FAMILY
DRAMA SERIES

.8M
10/10/2013
GLEE
NETWORK: FOX
COMEDY SERIES

1.2M
12/3/2013
THE VOICE
NETWORK: NBC
REALITY SERIES

Source: Nielsen SocialGuide, 2013.

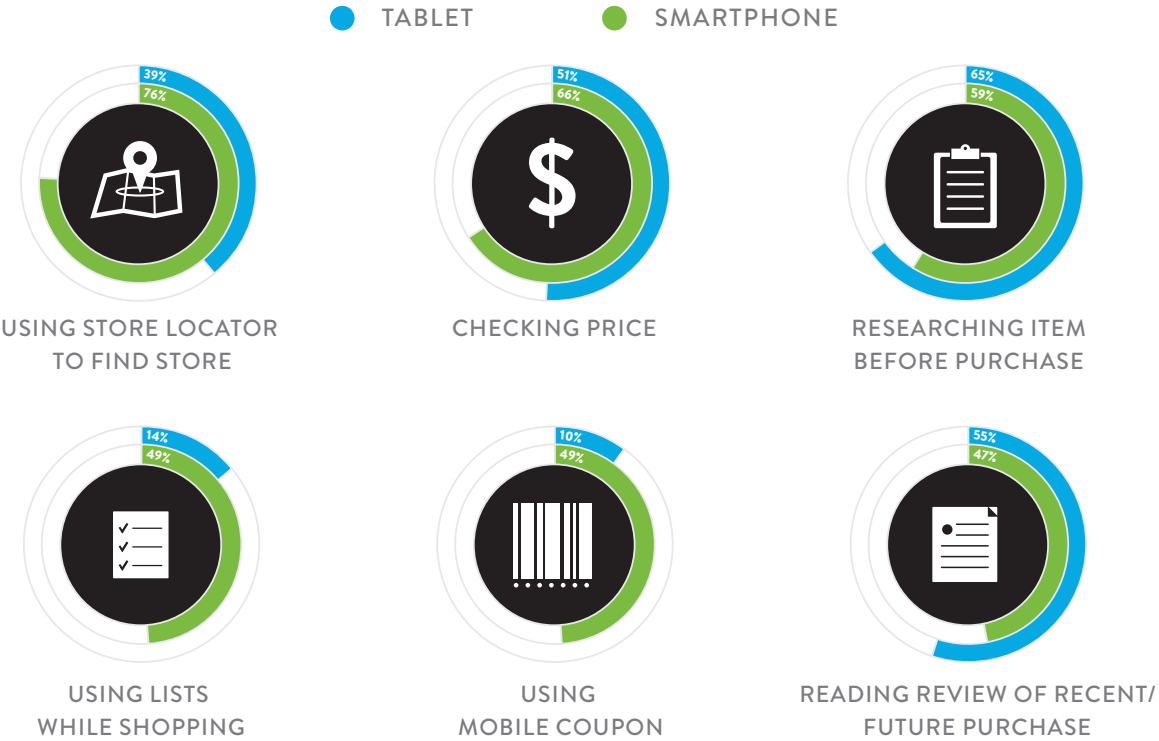
MOBILE TICKS ALL THE SHOPPING BOXES

As U.S. consumers continue take advantage of the convenience of anytime, anywhere browsing and shopping via their smartphones and tablets, there is a huge opportunity for retailers and brands to capture the full path-to-purchase of the online shopping experience.

Mobile retail is gaining momentum, with more than **four in five (87%) smartphone and tablet owners using a mobile device for shopping activities**.

Mobile shopping gives marketers opportunities to reach out throughout the consumer's purchase journey from start to finish. From consumers searching for more product information or price comparisons while in retail showrooms, to shopping directly on their device from the comfort of home, to sharing reviews and commenting on retail experiences and purchases through social media, mobile commerce is empowering consumers and providing brands with new consumer touchpoints.

COMPARING ACTIVITIES AMONG MOBILE SHOPPERS



Source: Nielsen Mobile Shopping Report, Q3 2013

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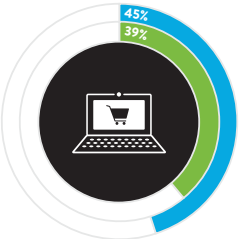
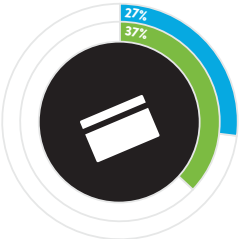
COMPARING ACTIVITIES AMONG MOBILE SHOPPERS (CONTINUED)

TABLET SMARTPHONE

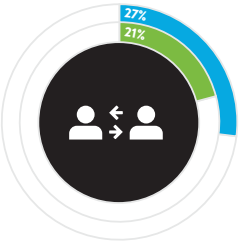


MAKING A DIGITAL PURCHASE



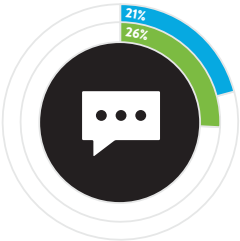
USING A DEVICE FOR PAYMENT

PURCHASING A PHYSICAL ITEM ON DEVICE



PURCHASE A SERVICE

WRITING A REVIEW OF A PURCHASE



USING SOCIAL MEDIA TO COMMENT ON PURCHASE

WHAT CHARACTERIZES THE MOBILE SHOPPER AMONG DIGITAL CONSUMERS?

Men and women are equally active shoppers on smartphones and tablets

More that one quarter (28%) earn more than $100k

Mobile shoppers skew younger with the majority under the age of 45

Locating a store is the most likely activity among mobile shoppers who use a smartphone

Reading reviews of recent / future purchases is the most likely activity for tablet owners

Source: Nielsen Mobile Shopping Report, Q3 2013

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 time-shifted content on a television set.

DIGITAL CABLE: Wired cable delivered through digital signals to your home.

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: 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).

COMPUTER: Desktop and laptop PC users who access the Web using browsers.

SMARTPHONE: A mobile phone that with an operating system which allows users to install and upgrade software/apps, with or without touchscreen interfaces.

TABLET: A touchscreen computer with internet connectivity, either via WiFi or high-speed 3G/4G wireless internet.

TIME-SHIFTED VIEWING: Typically refers to recording of content to a storage device, like a digital video recorder for viewing at a later time, or video on demand.

SMART TV: A television set with internet connection capabilities

SOCIAL TV: A conversation that takes place on social networks (e.g., Twitter) related to and happening around linear television programming.

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SOURCING & METHODOLOGY

TELEVISION METHODOLOGY (Q3 2013)

Television usage stats come from Nielsen's national panel of TV homes. Traditional TV includes Live usage plus any playback viewing within the measurement period. 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. The data cited in the Cross-Platform Report was collected during Q3 2013.

NIELSEN NETVIEW (JULY 2013)

An online panel of who install software on their home and work computers to share their activity using the Internet. Panelists use this proprietary software at the aggregate level, which is then calibrated using a hybrid methodology to be representative for the entire U.S. population. There are 200k+ panelists ages 2+ in the U.S. that participate in the online panel for NetView. The data cited in this report comes from July 2013.

NIELSEN VIDEOCENSUS (JULY 2013)

Sharing to Nielsen's online panel with NetView, this software is also installed on home and work computers to measure streaming video viewers in their web browser. Using a hybrid methodology, their streaming video activity is projected to be representative for the entire U.S. population. There are 200k+ panelists ages 2+ in the U.S. that participate in the online panel for VideoCensus. The data cited in this report comes from July 2013.

NIELSEN MOBILE NETVIEW (JULY 2013)

Nielsen's on-device software, Mobile NetView, is installed with permission on panelist smartphones (Android and iOS handsets). Mobile app and web usage are electronically measured through this opt-in panel. There are ~5,000 panelists ages 18+ that participate in the U.S. panel nationally. The data cited in this report was collected in July 2013 in the U.S.

NIELSEN CROSS PLATFORM REPORT (Q3 2013)

A quarterly report compiling measurement from across Nielsen products. Tables 2 and 3 of the report are based on users of each medium per month. Sources include: Traditional TV, Timeshifted TV, DVD, Game Consoles 07/01/13 - 09/29/13 via Nielsen NPOWER/NPM Panel, Online 07/01/13 - 09/30/13 via Nielsen Netview and Nielsen VideoCensus, Mobile 07/01/13 - 09/30/13 via Nielsen Mobile Video Report/Mobile Insights.

NIELSEN U.S. SOCIAL MEDIA SURVEY (2013)

The Nielsen U.S. Social Media Survey 2012 is based on a representative sample of 2,020 adult (18+) social media users who were recruited from the Nielsen Online Panel to take an online survey. "Social media user" is defined as participating, talking, and networking online through various platforms to share information and resources. This includes Internet forums, blogs, Facebook, Twitter, video sharing, consumer rating and other social networking websites. The survey fielded from October 25 to November 2, 2013.

NIELSEN NATIONAL PEOPLE METER PANEL (SEPTEMBER 2013)

A panel of households in the U.S. who use Nielsen's proprietary television metering hardware installed on their televisions to share their TV viewing habits at the program level. This panel of 20k+ households provides information about the TV programs they watch (at the aggregate level) and additional video sources connected to the TV. The data cited in this report was collected in September 2013.

NIELSEN OVER-THE-TOP VIDEO ANALYSIS (JULY 2013)

Survey-based data from the Nielsen Online Panel conducted as part of the Nielsen Over-the-Top Video Analysis. The survey was conducted in July 2013 with a sample of over 2000 consumers, including 1,000 Netflix users and 600 Hulu users.

CONNECTED DEVICES REPORT (Q3 2013)

The insights from Nielsen's Mobile Connected Device Report were gathered from general population sample 13+ yrs and with 9,448 respondents who own a Tablet, e-Reader, Smartphone or Streaming Capable Device. Device owners were identified from general population sample as well as through Nielsen's Mobile Insights syndicated tracking study. The respondents completed an online, self-administered survey at the start of September 2013.

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NIELSEN SOCIALGUIDE (2013)

Nielsen SocialGuide collects Tweets about TV programs across 250 U.S. TV networks in real-time. Using data from Twitter's fire hose, SocialGuide ensures comprehensive, accurate collection through automated and dynamic classifier creation, a rich TV program metadata database, and human auditing. SocialGuide collects relevant Tweets from three hours before, during and three hours after an episode's initial broadcast, local time. Unique Audience and Impressions of relevant Tweets are measured from when the Tweets are sent until the end of the broadcast day at 5am.

NIELSEN MOBILE SHOPPING REPORT (Q3 2013)

The insights from Nielsen's Mobile Shopping Report were gathered from general population sample 18+ yrs and with 3,032 total respondents who own either a Tablet or a Smartphone and have done a mobile shopping activity in the past 30 days. A Mobile Shopper is defined as someone who has done a "mobile shopping" activity on a Smartphone or Tablet in the past 30 days. The respondents completed an online, self-administered survey in September 2013.

NIELSEN CUSTOMER VALUE METRICS (Q2 2013)

A bill-scraping platform that measures actual mobile charges and usage by passively collecting information from online bills. The sample consists of 30,000+ opt-in panelists and 65,000+ line-level bills each month using advanced e-bill scraping technology. The sample consists of postpaid, non-corporate liable consumers that belong to the top 4 carriers. Nielsen Customer Value Metrics data cited in this publication was collected during Q2 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.

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