

A Nielsen Report
Global Online
Consumers and
Multi-Screen Media:
Today and Tomorrow

May 2012



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GLOBAL ONLINE CONSUMERS AND MULTI-SCREEN MEDIA TODAY AND TOMORROW




Reported global video consumption on in-home computers ranks as high as TV usage for online consumers



36% of global online consumers report owning a smartphone, up 15 percentage points since 2010



Online and mobile video consumption is steady and poised for growth



35% of online respondents worldwide say they are likely to make payments with their mobile phones

Innovations in technology, a multitude of connected devices, and evolutions in the media distribution landscape have provided more ways than ever to consume media across different screens, whether at home, at work, or on-the-go.

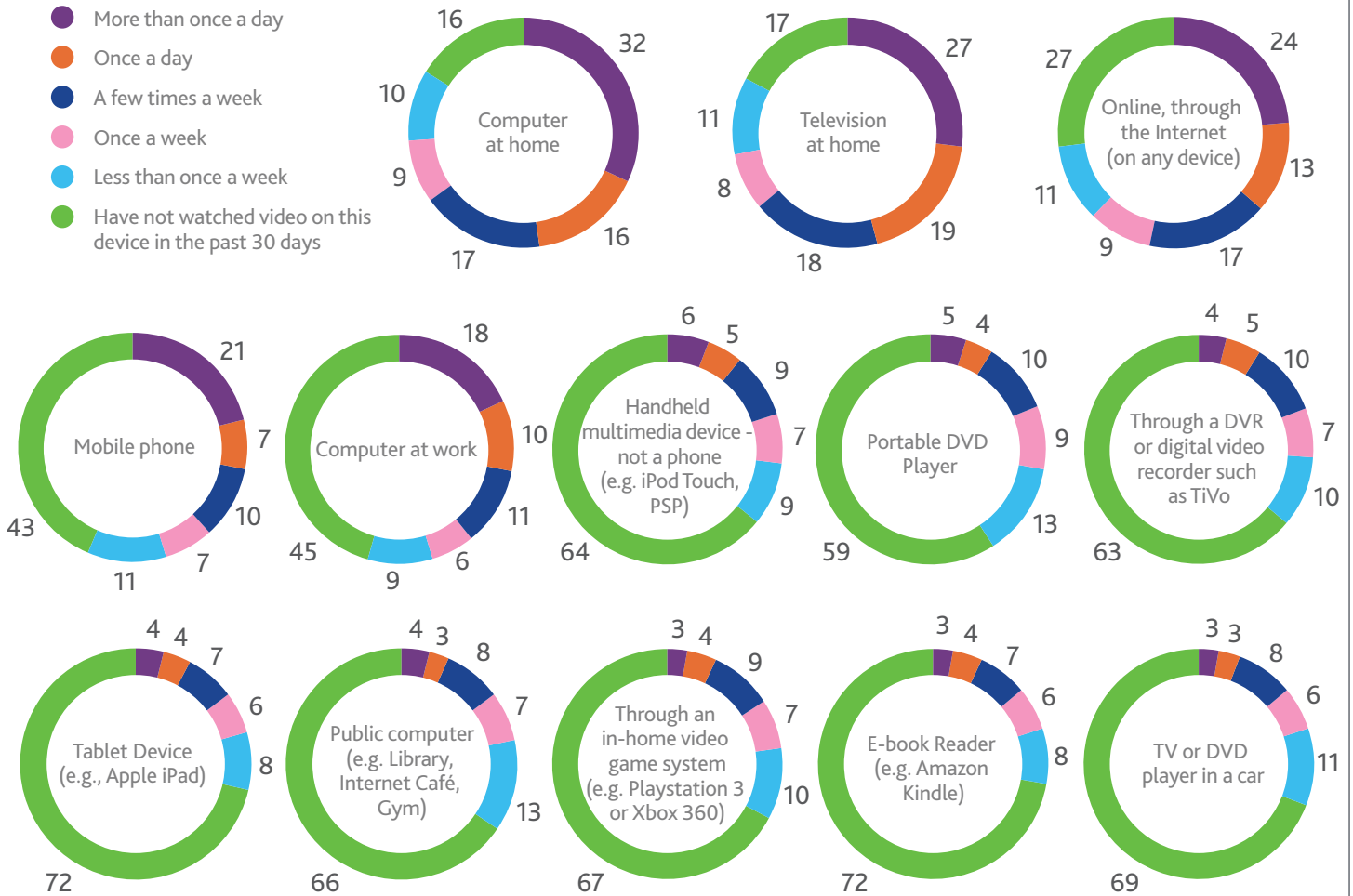
To understand how consumers around the world are responding to this fragmented media environment, Nielsen, a leading global provider of information and insights into what consumers watch and buy, surveyed online consumers across the globe on their multi-screen media usage, device ownership and purchase intentions, Internet access points, and how they see mobile technology's role in the future.

Nielsen's Global Survey of Multi-Screen Media Usage of more than 28,000 Internet respondents in 56 countries indicates that watching video content on computers has become just as popular as watching video content on television among online consumers, with over 80 percent reporting watching video content at home on a computer (84%) or on TV (83%) at least once a month. By contrast, in 2010, more online consumers reported watching video content on TV (90%) than on a computer (86%) in a month-long period.

How often have you watched video content on the following devices in the past 30 days?*

% Global Online Average

- More than once a day
- Once a day
- A few times a week
- Once a week
- Less than once a week
- Have not watched video on this device in the past 30 days



Source: Nielsen Global Survey of Multi-Screen Media Usage, Q3 2011
 *As reported by online consumers

About the Survey and Methodology

This report is based primarily on a series of media usage questions included in Nielsen's Global Survey, in August/September 2011. The survey polled more than 28,000 consumers with traditional online/Internet access from 56 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa, and North America. While online survey methodology allows for tremendous scale and global reach, it is limited in that it provides a perspective only on the habits of existing Internet users, not total populations. Results may therefore, among other possibilities, over-report online usage via computers, under-report traditional television usage, and/or under-report mobile media usage. Additionally, responses are only indicative of respondents' beliefs about their own media usage, rather than actual metered data.

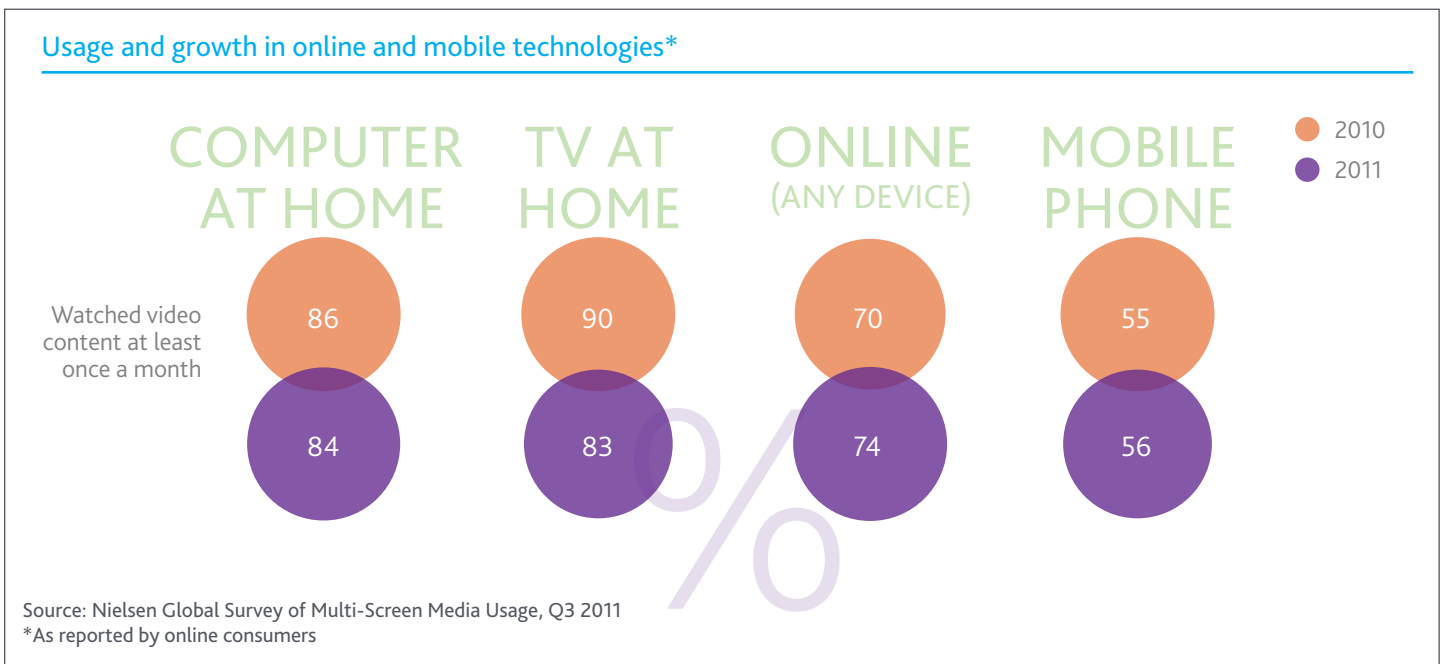
Reported online and mobile video viewing is on the rise

While the in-home TV and computer are still the most popular devices to watch video content, usage and growth in online and mobile technologies is making a sustained impact. Three-quarters (74%) of global respondents report watching video via the Internet (on any device), up four points since 2010, and over half of global online consumers (56%) say they watch video on a mobile phone at least once a month and 28 percent at least once a day.

Mobile video is particularly prominent in Asia-Pacific and Middle East/African regions, where 74 and 72 percent of online consumers, respectively, report watching video on mobile phones at least once a month, and almost 40 percent (38% and 37%, respectively) say they do so at least once a day. While mobile video is currently less

prominent in North America than in other parts of the world, it is seeing the highest growth rates in mobile phone video consumption. Thirty-eight percent of North American respondents say they watch mobile video once a month, up eight points compared to the 2010 reported results.

"The convenience of mobile connectivity has revolutionized how people are engaging with digital content and each other around the world," said Dounia Turrill, SVP, Client Insights, Nielsen. "With the growth of smartphones, mobile video consumption is on the rise for entertainment content, particularly in emerging markets where many consumers leapfrog home Internet altogether in favor of the all-in-one smartphone."



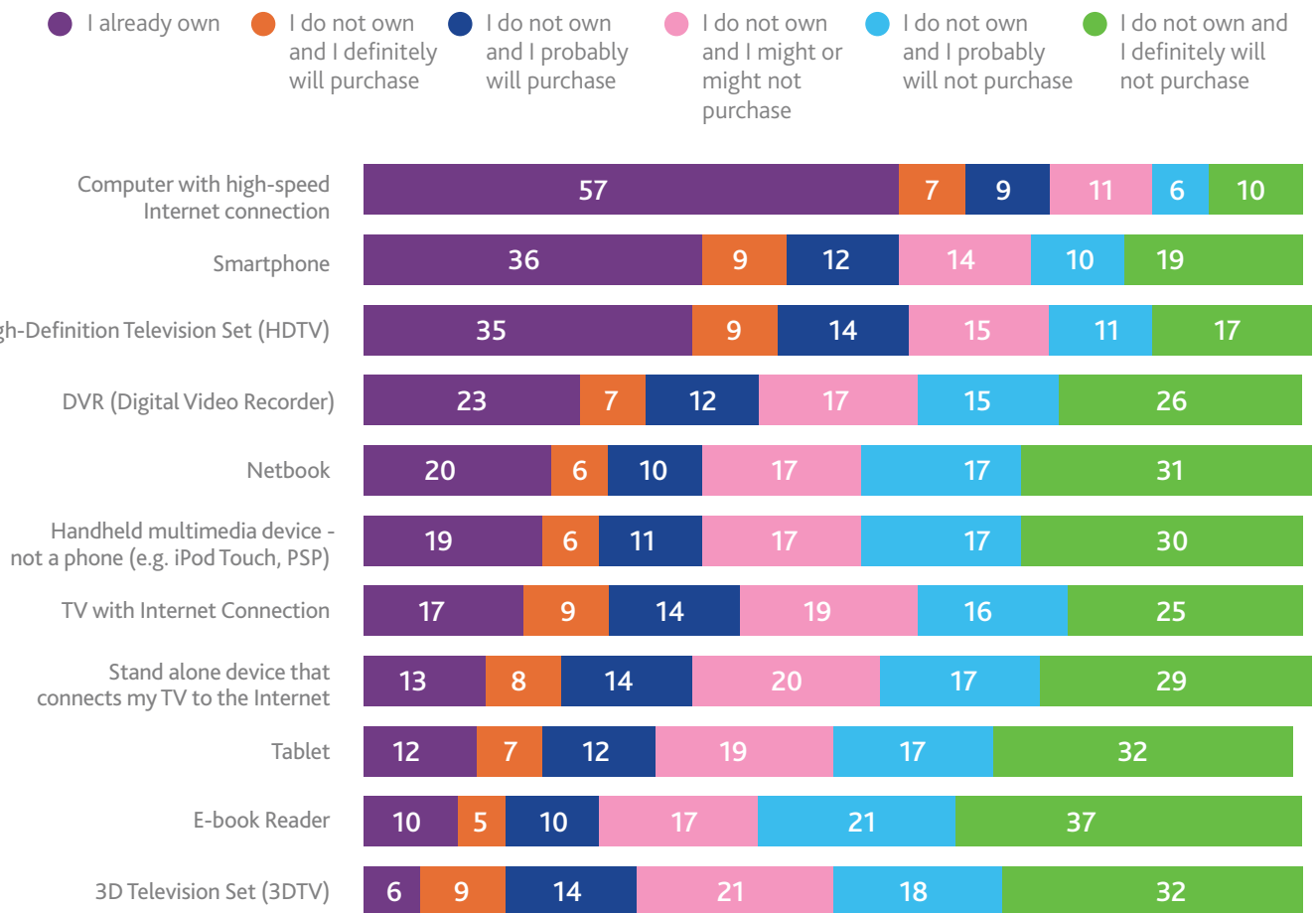
Smartphones are increasingly popular. Are tablets next?

Online video consumption is likely to continue its rise, as consumers are increasingly connecting to the Internet at high speeds. More than half (57%) of online respondents around the world indicate they own a computer with high-speed online access—an increase of four points since 2010, and an additional 16 percent say they plan to purchase one within the next year.

TV use is also poised for continued prominence, as global online consumers report owning or intending to purchase such technologies as high-definition TVs (HDTVs) (58%), digital video recorders (DVRs) (42%), connected TVs (35%), and 3D-capable sets (29%).

Do you currently own or will you purchase any of these items in the next 12 months?*

Global Online Average



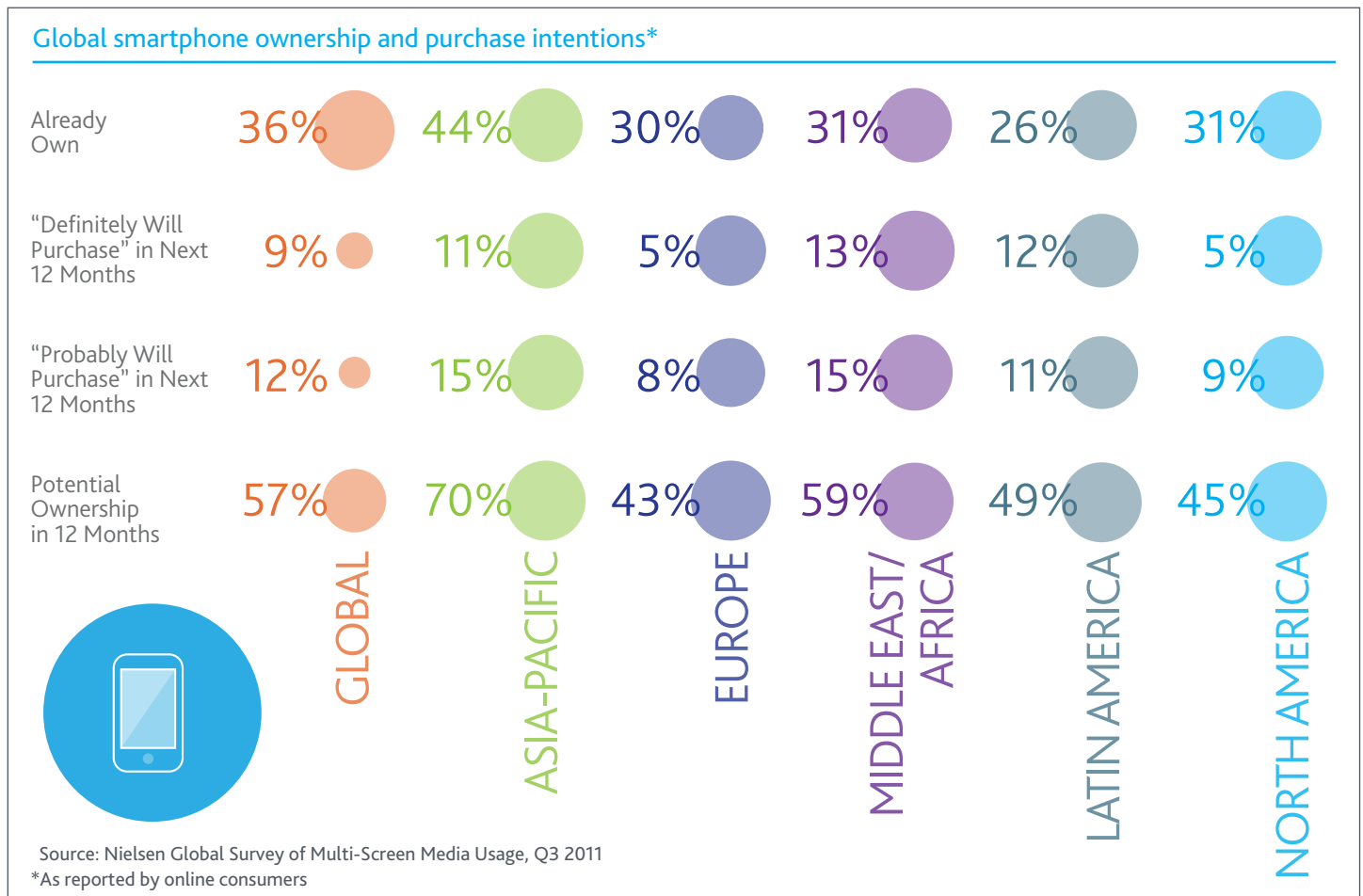
Source: Nielsen Global Survey of Multi-Screen Media Usage, Q3 2011

*As reported by online consumers

Portable devices and their impact on media consumption

In the years ahead, mobile phones and other portable devices will affect media consumption, as global consumers with Internet access increasingly report owning or intending to purchase smartphones and Internet-connected tablets. Thirty-six percent of global online respondents report owning a smartphone—an

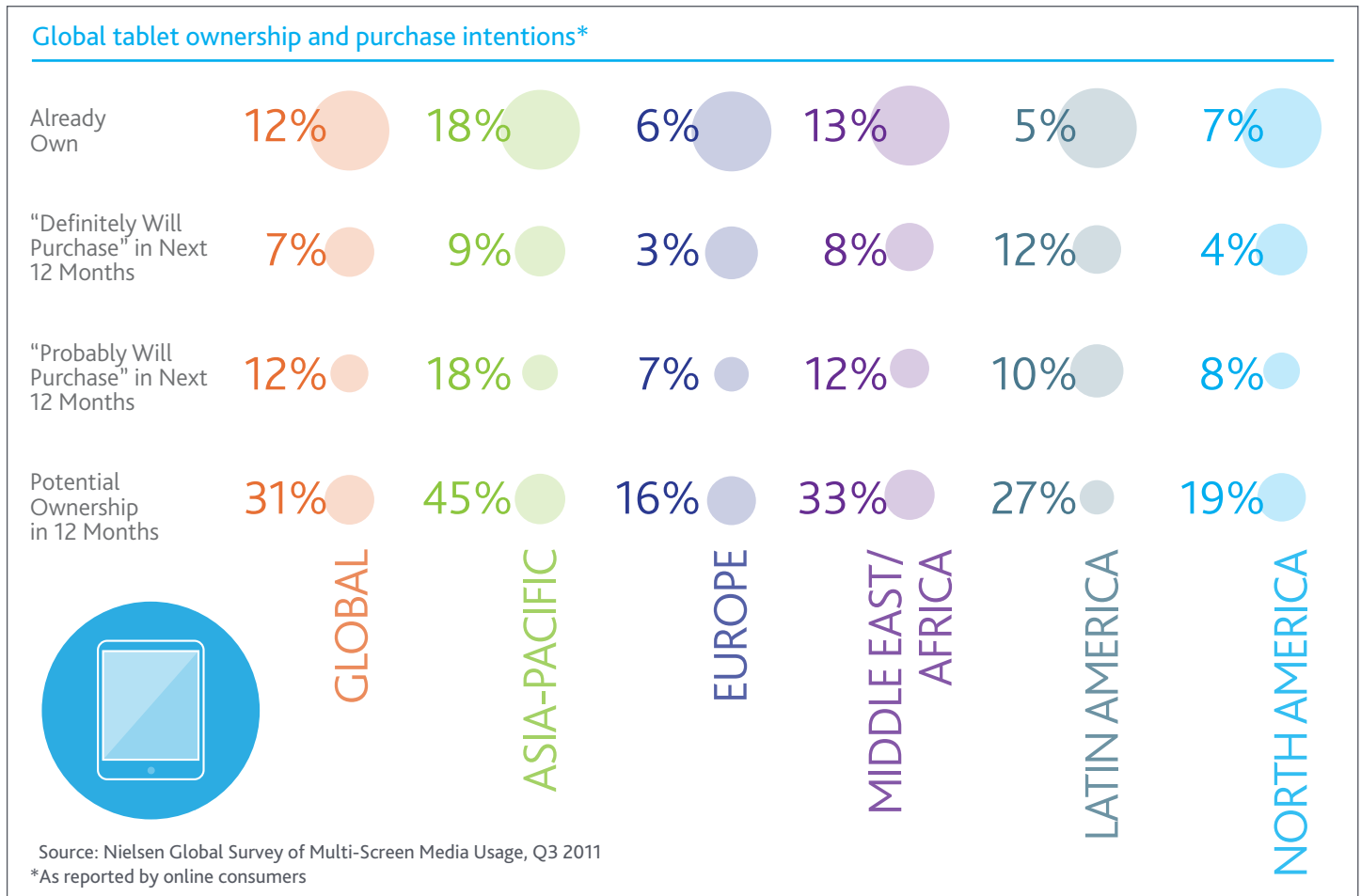
increase of 15 points since 2010. In Asia-Pacific markets, 44 percent of online consumers report owning a smartphone and another quarter will either definitely (11%) or probably (15%) purchase one in the next year. In Middle East/African markets, 31 percent of online respondents have a smartphone already, and nearly as many (28%) will likely buy one within a year.



Tablet growth is poised for continued growth

While tablets are an emerging category with lower levels of penetration than smartphones, global consumers are exhibiting increased interest around these devices. According to the survey findings, 12 percent of online respondents worldwide own a tablet today—up over 70 percent from the seven percent who reported ownership in 2010. Another 19 percent say they are likely to purchase a tablet within the next year. Adoption is highest in Asia-Pacific markets, where almost one of every five (18%) online consumers report ownership of a tablet and even more (27%) plan to purchase one within 12 months.

"The impact of mobile technology can be felt around the globe and touches all aspects of life, from entertainment and shopping to business and personal communication," said Amilcar Pérez, President, Telecom, Nielsen. "In recent years, smartphones and tablets, with their accessibility, vibrant screens and Internet access, have propelled us further forward into a new and exciting digital age. This has been felt around the globe and has enabled connections in all markets, particularly emerging markets, like never before."

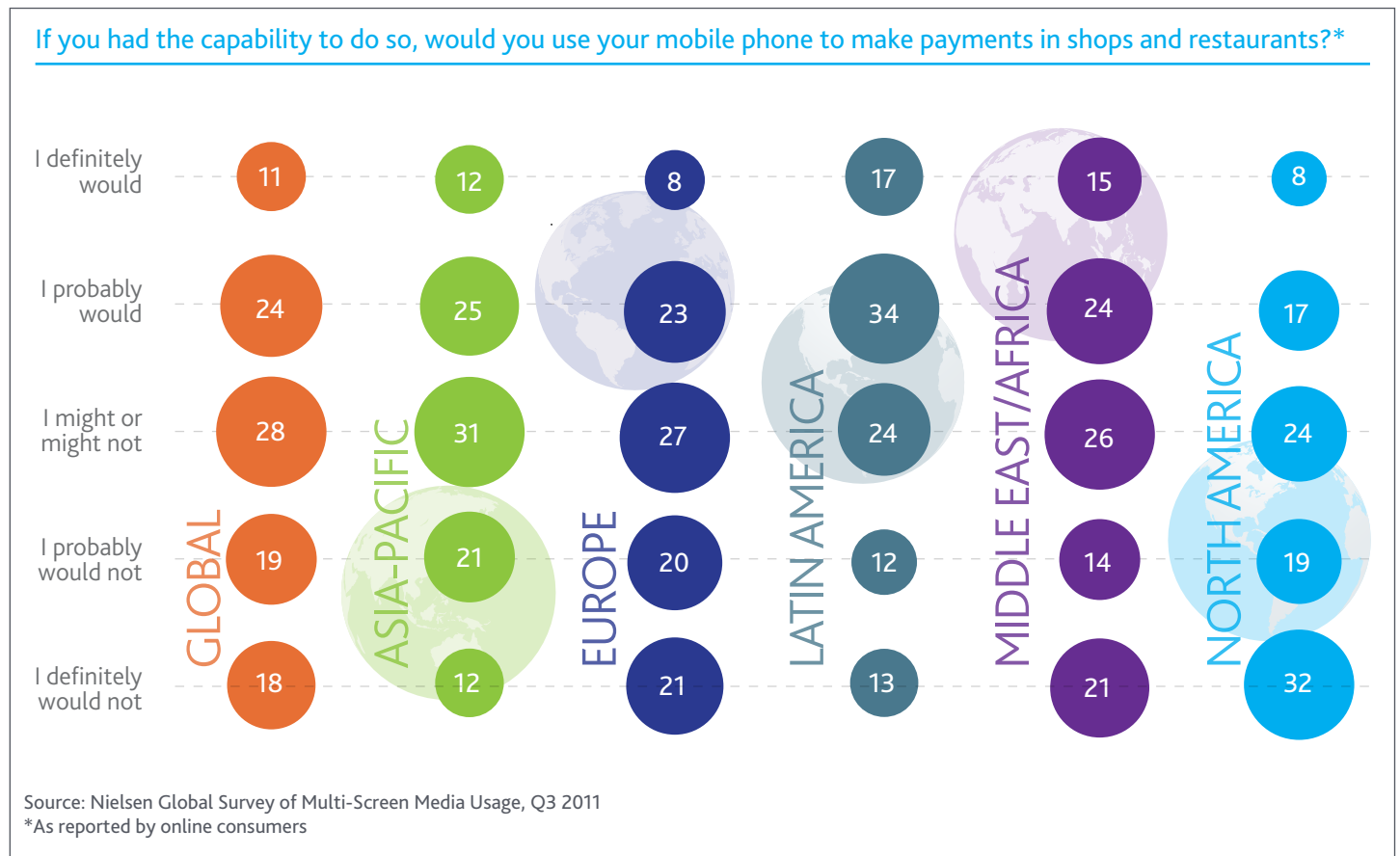


Mobile phone payments are a viable option for many

The practice of using a mobile phone to make purchases in stores and restaurants in lieu of cash, check, or credit/bank cards shows strong potential. Almost two-thirds (63%) of global online respondents are open to the idea of making payments via mobile phones, with 24 percent likely to do so, and 11 percent fully committed to the idea.

Latin Americans with Internet access are the most likely to consider mobile phone payments, with almost one-fifth (17%) definitely willing and another 34 percent likely open to the practice.

Online consumers from Asia-Pacific and Middle East/African markets are also largely willing to try mobile payments, with almost 40 percent (37% and 39%, respectively) reporting that they either definitely or probably would buy goods and services with mobile payment technology. In North America, consumers are relatively less open to mobile payments than other regions. One-fourth of North American respondents probably or definitely would try mobile phone purchase methods, which has increased seven percentage points since 2010, when only 18 percent of North American online consumers were open to the idea.



Countries in the Study:

Argentina
Australia
Austria
Belgium
Brazil
Canada
Chile
China
Colombia
Croatia
Czech Republic
Denmark
Egypt
Estonia
Finland
France
Germany

Greece
Hong Kong
Hungary
India
Indonesia
Ireland
Israel
Italy
Japan
Latvia
Lithuania
Malaysia
Mexico
Netherlands
New Zealand
Norway
Pakistan
Peru
Philippines
Poland
Portugal

Romania
Russia
Saudi Arabia
Singapore
South Africa
South Korea
Spain
Sweden
Switzerland
Taiwan
Thailand
Turkey
United Arab Emirates
United Kingdom
Ukraine
United States
Venezuela
Vietnam

About the Nielsen Global Survey

The Nielsen Global Survey of Multi-Screen Media Usage was conducted in August/September 2011 and polled more than 28,000 consumers in 56 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of $\pm 0.6\%$. This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10M online population for survey inclusion. The Nielsen Global Survey was established in 2005.

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.

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