



MORE OF WHAT WE WANT

THE CROSS-PLATFORM REPORT
JUNE 2014

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

WELCOME

Today's viewers are making device and platform choices that have a profound impact on the meaning of television and video.

This May we witnessed a great transformation during a traditionally television-centric time of the year. Referred to as the *Upfront*, TV networks showcase their fall shows and highlight what American consumers' love: **content**. The *Upfront* draws the interest of advertisers and media networks as they engage in an elaborate negotiation and collaboration around the buying and selling of advertising inventory for the coming season. This year was different.

Early conversations around time-shifting and digital became very real. *Upfront* talks around shifting some deals from Live+3 days to Live+7 days, digital rights, and programmatic buying, have those of us in the media and advertising industry on the edge of our seats.

Just as cable networks entered the *Upfront* fanfare a few years back, digital publishers, who have for the past couple of years showcased themselves in the *Newfronts*, came out strong. Capturing the attention of Millennials in growing numbers, these agile powerhouses challenge the media landscape.

And, at the risk of being repetitive, the American consumer has never before engaged with more content across media type, media devices and content type.

THE VIDEO VIEWING CURVE CONTINUES TO GROW AS DELIVERY AND EXPLORATION OF CONTENT CONTINUES TO EXPAND.

Understanding, defining and measuring this curve matters to our clients. Time-shifting allows us to watch more content, video on demand allows us to watch more content, and digital delivery allows us to watch more content.

Over the past quarters I've often placed emphasis on what Nielsen refers to as a growing pie in a fragmented landscape both when thinking of video content across digital and linear and when thinking about general access to information and social networks.



DOUNIA TURRILL
SVP INSIGHTS, NIELSEN

THE VIDEO VIEWING CURVE, POWERED BY INCREASED MOBILE DEVICE PENETRATION, SIMPLY HIGHLIGHTS WHAT WE'VE COME TO ACCEPT OVER TIME: WE CAN DO MORE IN LESS TIME.

As device penetration grows, as content reaches people in ways it never could before, so does the appetite to engage with video. With only 24 hours in a day, how can we manage all this screen time? We do; we condense more information into a finite amount of time. Second screen experiences, the ultimate in multitasking, allow us to connect in ways that are immediate.

Over the last two years, video on demand has matured into a significant platform for content delivery and discovery. Available in over 60% of households video on demand (VOD) is increasingly contributing to the viewing potential. While on average VOD contributes 4-5 percent in the coveted 18-49 demo, individual shows have seen upward of 15-20% increase in viewership from VOD. It's also a platform that is appealing to younger demos as well as Asian-Americans whose overall contribution through VOD is 8%.

Add to the opportunity for discovery and catch-up viewing VOD provides, subscription VOD (SVOD) has capitalized on another desire for content. With over 40% of US TV households currently subscribing to at least one SVOD service and the opportunity to use these platforms has grown among younger segments. These SVOD subscribers are more likely to have children, more likely to be educated and more likely to have a higher income—all very coveted demos.

Connecting all the pieces that make this Video Viewing Curve leaves us with a fundamental question. Who are we reaching, when, where and how? We reach the answer by understanding and measuring consumer behavior. Data into viewer and buyer preferences and habits inform the industry's decisions and negotiations. As Nielsen offers both linear and digital content and advertising measurement, the marketplace enters the 2014-2015 season armed with solutions that rely on comprehensive, representative and industry standard setting measurement.

With ever-growing fragmentation of content and delivery, media companies and advertisers create the messages around the consumer. The consumer is selective and the viewer has more options than any other time in history. At the end of the day, or the *Upfront/Newfront* period, content continues to be king and viewers make more and more time to view what matters to them.



DOUNIA

VIDEO ON DEMAND

The flavors of on demand continue to expand, giving viewers additional ways to discover, catch-up and access content. Video on demand (VOD) is currently available to 60% of US TV households and Subscription Video on demand (SVOD) is in 41% of US TV households. As these offerings continue to provide consumers with the control to explore video how, when and where they want, we continue to deliver measurement and insights to understand these shifts.

A LOOK AT RECENTLY TELECAST (RT) VIDEO ON DEMAND

Programming that is delivered on the VOD platform within 7 days of the original telecast with the same commercial load as the original broadcast

● LIVE VIEWING ● TIME-SHIFTED VIEWING WITHIN 7 DAYS ● VIDEO ON DEMAND VIEWING

AGE



RACE/ETHNICITY



RECENTLY TELECAST VIDEO ON DEMAND PROFILE

● RECENTLY TELECAST VOD VIEWERS ● NON RECENTLY TELECAST VOD VIEWERS

ETHNIC BREAKDOWN



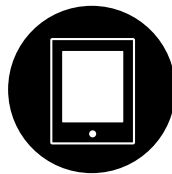
SMARTPHONE OWNER

85%
77%



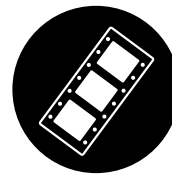
DVR HOUSEHOLD

57%
52%



TABLET OWNER

51%
42%



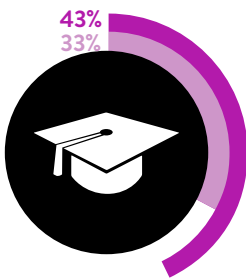
DVD OWNER

84%
83%

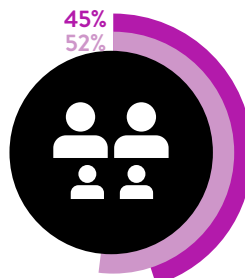


VIDEO GAME CONSOLE OWNER

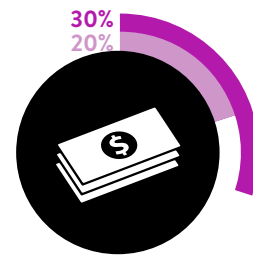
63%
56%



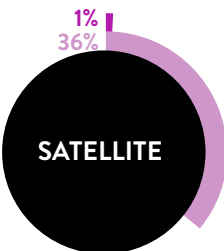
4+ YEARS OF COLLEGE



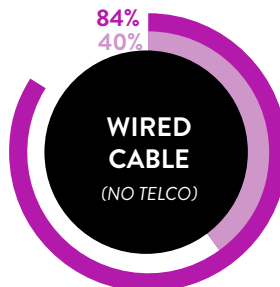
HAVE CHILDREN



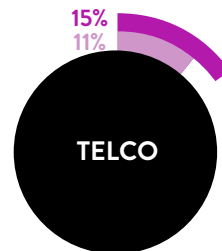
HOUSEHOLD INCOME 100K+



SATELLITE



WIRED CABLE (NO TELCO)



TELCO



VOD VIEWERS WATCH MORE TV!

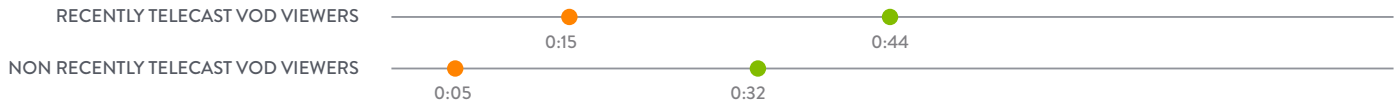
DAILY TIME SPENT IN PRIMETIME VIEWING

● TIME-SHIFTED VIEWING ● LIVE VIEWING

COMPOSITE HOUSEHOLDS



ASIAN AMERICAN HOUSEHOLDS



HISPANIC HOUSEHOLDS



AFRICAN AMERICAN HOUSEHOLDS



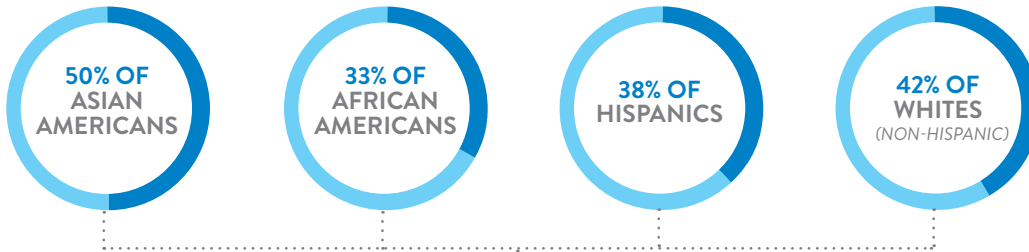
WHITE HOUSEHOLDS (NON -HISPANIC)



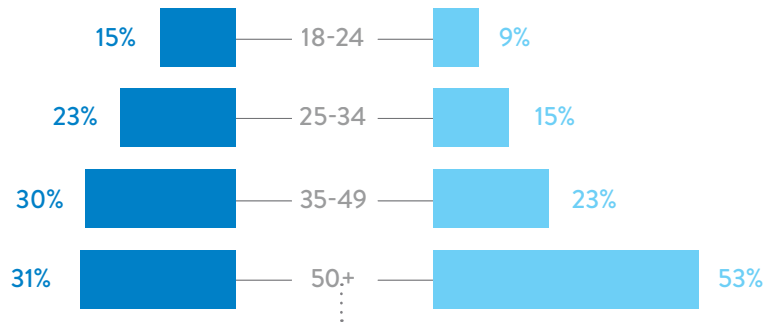
SUBSCRIPTION VIDEO ON DEMAND (SVOD)

● USE SVOD ● DO NOT USE SVOD

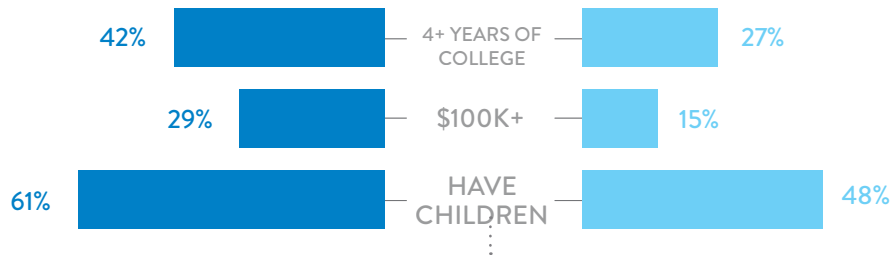
PENETRATION



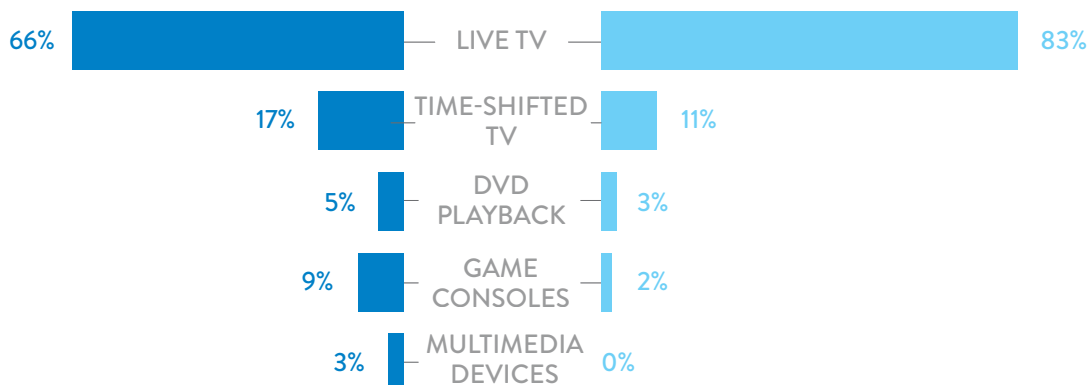
AGE



WHO ARE THEY?

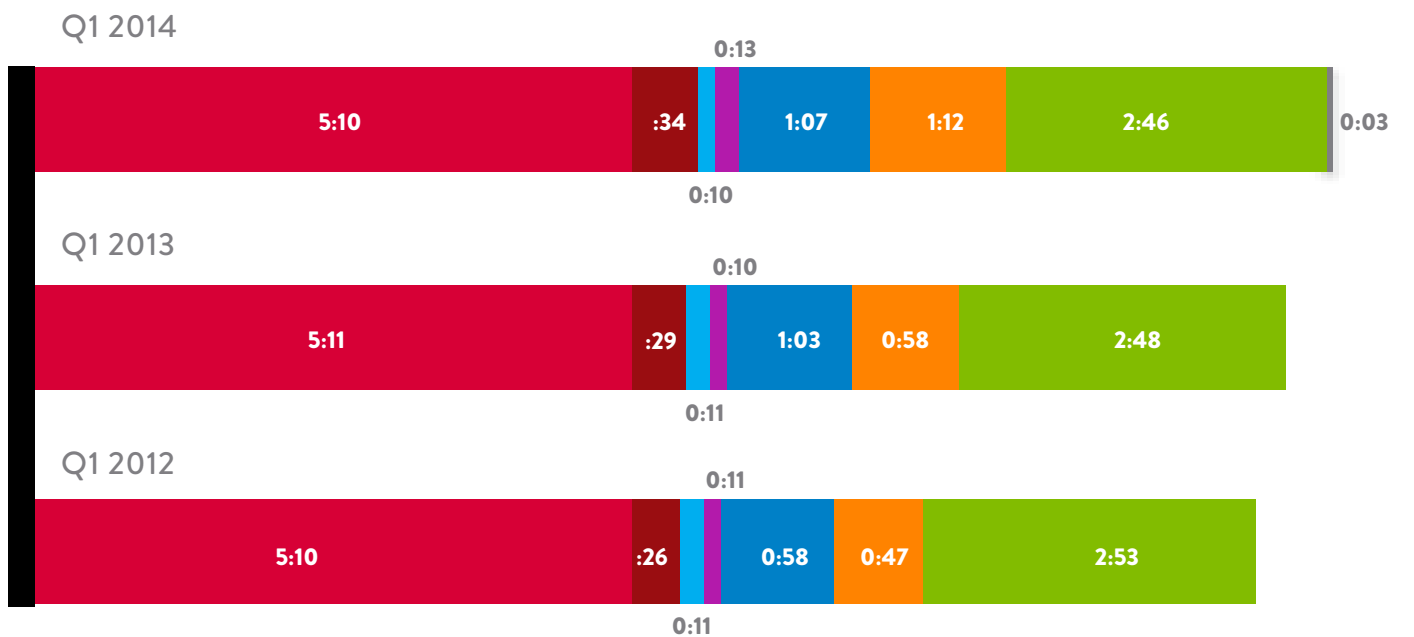


WHAT DO THEY WATCH?



A CLOSER LOOK AT THE DATA

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



- LIVE TV
- USING A GAME CONSOLE
- LISTENING TO AM/FM RADIO
- WATCHING TIME-SHIFTED TV
- USING INTERNET ON A COMPUTER
- USING A MULTIMEDIA DEVICE
- USING DVD/BLU-RAY DEVICE
- USING A SMARTPHONE

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	24:19	21:12	21:49	27:35	34:23	45:18	52:03	34:31	37:40	48:21	27:44	18:59
Watching Time-Shifted TV	2:25	1:59	1:54	3:37	4:13	4:17	3:22	3:22	3:41	2:45	2:12	2:13
Using a DVD/ Blu-Ray Device	2:05	1:06	0:57	1:34	1:18	1:04	0:39	1:15	1:07	1:19	1:14	0:51
Using a Game Console	3:09	4:11	3:48	2:49	1:14	0:25	0:08	1:53	1:26	2:09	2:01	1:08
Using a Multimedia Device	0:23	0:17	0:24	0:31	0:27	0:15	0:13	0:21	0:21	0:10	0:12	1:02
Using the Internet on a Computer	0:21	0:43	5:29	6:12	7:30	5:59	2:55	4:38	5:47	4:44	3:13	3:58
Watching Video on Internet	0:17	0:27	2:28	2:11	1:45	1:12	0:23	1:16	1:31	1:29	1:09	1:28
Using any App/Web on a Smartphone	n/a	n/a	8:12	8:21	6:35	3:46	0:57	n/a	5:20	8:40	8:19	6:57
Watching Video on a Smartphone	n/a	n/a	0:25	0:16	0:08	0:04	-	n/a	0:09	0:21	0:20	0:15
Listening to AM/FM Radio	n/a	7:39	10:44	11:54	14:10	15:07	12:13	12:41	13:13	13:09	12:53	n/a

TABLE 2 – OVERALL USAGE BY MEDIUM
NUMBER OF USERS 2+ (IN 000'S) – MONTHLY REACH

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013
On Traditional TV	285,394	282,949	37,342	37,031	48,364	47,296	15,281	15,778
Watching Time-Shifted TV	177,690	166,088	22,000	20,521	24,940	21,392	8,507	8,118
Using a DVD/Blu-Ray Device	145,949	152,467	16,413	18,436	23,959	24,236	7,172	7,787
Using a Game Console	102,142	99,275	12,949	12,543	19,619	17,873	5,834	5,804
Using a Multimedia Device	20,654	n/a	1,164	n/a	2,379	n/a	2,628	n/a
Using the Internet on a Computer	199,835	208,055	24,586	24,925	26,861	27,199	7,437	7,220
Watching Video on Internet	151,504	155,169	18,489	18,141	19,998	20,474	5,921	5,764
Using any App/Web on a Smartphone	148,983	121,750	19,290	15,936	27,740	24,007	8,823	7,285
Watching Video on a Smartphone	103,459	89,749	15,804	12,756	21,696	19,812	6,497	5,491

TABLE 3 – MONTHLY TIME SPENT BY MEDIUM
USERS 2+ IN HOURS: MINUTES

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013
On Traditional TV	159:07	157:32	222:41	216:18	125:45	129:25	92:55	92:58
Watching Time-Shifted TV	15:32	13:23	12:40	10:04	9:58	8:33	10:51	9:24
Using a DVD/Blu-Ray Device	5:45	5:56	6:05	6:32	5:34	5:42	4:08	5:14
Using a Game Console	8:42	6:56	9:52	8:10	9:09	7:18	5:33	5:10
Using a Multimedia Device	1:37	n/a	0:45	n/a	0:53	n/a	5:05	n/a
Using the Internet on a Computer	30:11	28:28	32:36	29:57	25:35	23:26	38:57	37:52
Watching Video on Internet	10:49	7:02	13:38	9:44	12:16	8:46	18:13	13:24
Using any App/Web on a Smartphone	36:54	29:50	46:59	35:09	44:33	34:51	38:47	27:50
Watching Video on a Smartphone	1:37	1:11	2:21	1:34	2:21	1:43	1:55	1:49

**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	111:47	96:21	111:15	131:35	156:23	202:32	234:28	159:07
Watching Time-Shifted TV	11:05	8:59	9:41	17:16	19:12	19:11	15:11	15:32
Using a DVD/Blu-Ray Device	9:34	5:00	4:51	7:30	5:53	4:45	2:58	5:45
Using a Game Console	14:27	19:00	19:25	13:26	5:36	1:54	0:37	8:42
Using a Multimedia Device	1:45	1:16	2:03	2:26	2:01	1:06	0:57	1:37
Using the Internet on a Computer	4:20	6:43	33:26	34:26	38:16	34:12	23:22	30:11
Watching Video on Internet	5:17	6:23	19:08	15:37	11:31	8:46	4:03	10:49
Using any App/Web on a Smartphone	n/a	n/a	45:42	45:31	38:10	26:26	21:50	36:54
Watching Video on a Smartphone	n/a	n/a	2:52	1:52	1:12	1:02	0:26	1:37

**TABLE 4A – 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	157:12	151:11	170:49	190:50	225:27	303:59	336:32	222:41
Watching Time-Shifted TV	9:09	8:29	9:59	14:30	15:31	15:44	11:09	12:40
Using a DVD/Blu-Ray Device	7:09	2:57	4:32	9:43	5:49	7:00	3:09	6:05
Using a Game Console	14:07	20:14	16:32	15:14	6:24	1:40	0:58	9:52
Using a Multimedia Device	0:41	0:30	0:25	1:12	1:19	0:31	0:08	0:45
Using the Internet on a Computer	5:34	7:03	37:51	40:00	39:52	35:26	20:05	32:36
Watching Video on Internet	4:41	5:21	22:33	20:45	13:21	10:31	4:19	13:38
Using any App/Web on a Smartphone	n/a	n/a	50:53	61:47	48:26	35:34	-	46:59
Watching Video on a Smartphone	n/a	n/a	3:43	2:55	1:43	1:36	-	2:21

**TABLE 4B – 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	110:04	87:00	96:36	113:37	130:40	166:00	219:23	125:45
Watching Time-Shifted TV	9:16	7:01	7:06	10:17	12:02	11:52	10:23	9:58
Using a DVD/Blu-Ray Device	9:19	5:17	4:26	5:33	5:07	3:41	2:23	5:34
Using a Game Console	12:20	18:02	15:30	11:10	3:57	1:38	1:01	9:09
Using a Multimedia Device	1:06	1:05	0:48	0:59	1:08	0:16	0:18	0:53
Using the Internet on a Computer	3:43	6:37	32:08	34:07	30:16	31:01	15:38	25:35
Watching Video on Internet	5:54	6:27	21:51	15:01	10:15	11:35	4:02	12:16
Using any App/Web on a Smartphone	n/a	n/a	46:27	51:51	42:47	30:35	-	44:33
Watching Video on a Smartphone	n/a	n/a	4:01	2:17	1:30	1:06	-	2:21

**TABLE 4C – 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	62:03	64:50	63:00	88:12	83:56	112:57	167:13	92:55
Watching Time-Shifted TV	8:17	9:07	7:36	12:57	12:15	12:04	9:49	10:51
Using a DVD/Blu-Ray Device	7:09	2:53	2:08	4:52	3:53	3:21	3:33	4:08
Using a Game Console	8:45	7:59	12:00	7:52	4:21	1:33	0:40	5:33
Using a Multimedia Device	3:59	3:19	4:00	7:55	4:36	5:42	4:35	5:05
Using the Internet on a Computer	5:14	11:53	56:28	35:26	52:27	26:08	26:40	38:57
Watching Video on Internet	7:26	11:01	29:12	23:45	16:13	10:42	8:21	18:13
Using any App/Web on a Smartphone	n/a	n/a	38:55	43:26	36:21	-	-	38:47
Watching Video on a Smartphone	n/a	n/a	2:02	1:59	1:32	-	-	1:55

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

STREAMING QUINTILE	COMPOSITE				AFRICAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Stream 1	25,725	27.6	61.3	275.4	2,517	29.8	65.9	414.1
Stream 2	25,695	3.1	32.3	283.5	2,503	4.2	25.5	400.7
Stream 3	25,709	0.9	20.2	275.8	2,508	1.2	20.7	401.3
Stream 4	25,711	0.2	13.2	273.2	2,508	0.4	13.7	374.7
Stream 5	25,711	0.0	7.7	284.9	2,511	0.0	7.7	375.5
Non Streamers	115,297	0.0	1.0	258.6	12,826	0.0	0.6	355.1
All	243,848	3.4	14.7	269.2	25,375	3.6	13.7	374.1

STREAMING QUINTILE	HISPANIC				ASIAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Stream 1	3,430	26.0	42.7	208.4	1,587	50.9	64.4	143.0
Stream 2	3,429	3.8	16.6	196.9	1,580	4.6	25.7	159.2
Stream 3	3,434	1.1	10.8	191.3	1,595	1.4	16.3	160.0
Stream 4	3,442	0.3	7.3	238.5	1,609	0.4	11.7	191.2
Stream 5	3,417	0.0	6.8	220.7	1,563	0.0	6.8	149.9
Non Streamers	18,684	0.0	0.4	205.6	7,312	0.0	0.7	157.3
All	35,836	3.0	8.4	208.3	15,246	6.0	13.3	159.2

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

INTERNET QUINTILE	COMPOSITE				AFRICAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Internet 1	34,201	15.5	75.9	335.6	3,376	17.5	75.1	489.6
Internet 2	34,199	5.4	19.0	281.9	3,369	5.9	17.5	384.6
Internet 3	34,198	1.9	6.5	258.1	3,368	2.1	6.4	357.7
Internet 4	34,207	0.8	1.8	252.2	3,368	0.8	1.7	352.8
Internet 5	34,199	0.2	0.3	253.6	3,377	0.2	0.3	336.8
Non Internet Users	72,844	0.0	0.0	251.7	8,516	0.0	0.0	352.6
All	243,848	3.4	14.7	269.2	25,375	3.6	13.7	374.1

INTERNET QUINTILE	HISPANIC				ASIAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Internet 1	4,503	15.5	49.0	240.8	2,018	27.9	71.2	164.6
Internet 2	4,491	5.0	10.5	196.2	2,051	12.0	20.1	149.8
Internet 3	4,495	1.7	4.3	206.4	2,038	2.4	6.4	185.1
Internet 4	4,514	0.8	1.4	191.5	2,027	2.0	1.7	156.5
Internet 5	4,481	0.2	0.2	205.8	2,040	0.3	0.2	161.4
Non Internet Users	13,352	0.1	0.0	208.4	5,071	0.0	0.0	150.4
All	35,836	3.0	8.4	208.3	15,246	6.0	13.3	159.2

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

TELEVISION QUINTILE	COMPOSITE				AFRICAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Television 1	48,224	3.4	22.5	663.5	5,042	4.4	25.2	869.6
Television 2	48,227	2.5	15.7	339.3	5,019	3.4	13.2	479.4
Television 3	48,217	2.9	13.1	208.4	5,031	2.7	11.8	295.4
Television 4	48,224	2.7	10.6	113.9	5,042	3.1	10.9	177.8
Television 5	48,231	5.3	11.4	29.2	5,030	4.3	7.6	56.1
Non Television Viewers	2,724	5.9	18.2	0.0	211	2.9	5.7	0.0
All	243,848	3.4	14.7	269.2	25,375	3.6	13.7	374.1

TELEVISION QUINTILE	HISPANIC				ASIAN AMERICAN			
	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)	# OF PERSONS (000)	STREAM (AVERAGE DAILY MINUTES)	INTERNET (AVERAGE DAILY MINUTES)	TV (AVERAGE DAILY MINUTES)
Television 1	7,106	3.2	13.8	492.7	2,985	4.7	13.8	447.7
Television 2	7,112	2.2	7.0	259.1	2,998	3.4	13.5	200.0
Television 3	7,106	2.5	6.7	169.4	2,987	3.9	10.5	104.8
Television 4	7,109	2.5	6.1	96.9	2,985	4.8	16.1	47.9
Television 5	7,107	4.4	8.0	26.5	2,993	13.4	13.2	8.7
Non Television Viewers	297	9.3	10.7	0.0	297	3.0	7.5	0.0
All	35,836	3.0	8.4	208.3	15,246	6.0	13.3	159.2

TABLE 6 – SMARTPHONE VIDEO VIEWING QUINTILES
 BASED ON ADULTS 18+ USAGE OF VIDEO ON APPS/WEB

SMARTPHONE QUINTILES	Q1 2014		Q1 2013	
	# OF PERSONS (000)	TPP (HH:MM:SS)	# OF PERSONS (000)	TPP (HH:MM:SS)
Smartphone 1	20,671	6:36:24	17,924	4:43:52
Smartphone 2	20,699	1:03:22	17,948	0:47:37
Smartphone 3	20,688	0:21:34	17,958	0:16:47
Smartphone 4	20,697	0:06:35	17,965	0:05:08
Smartphone 5	20,704	0:00:58	17,953	0:00:43
All	103,459	1:37:42	89,749	1:10:45

TABLE 7 - TELEVISION DISTRIBUTION SOURCES
 NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013
Broadcast Only	11,617	11,173	2,038	1,874	2,825	2,573	690	605
Wired Cable (No Telco)	54,951	57,161	7,688	7,640	5,725	6,454	2,148	2,084
Telco	12,111	10,318	1,573	1,272	1,363	1,111	641	604
Satellite	34,770	34,907	3,466	3,823	5,564	5,118	749	1,005
Broadband Only	1,627	n/a	120	n/a	144	n/a	171	n/a

TABLE 8 – CABLE/SATELLITE HOMES WITH INTERNET STATUS

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013
Broadcast Only and Broadband Access	5,923	5,299	635	539	941	841	505	459
Broadcast Only and No Internet/ Narrowband Access	6,404	6,011	1,354	1,275	1,772	1,606	166	135
Cable Plus and Broadband Access	79,941	78,098	8,184	7,952	8,813	8,394	3,444	3,369
Cable Plus and No Internet/ Narrowband Access	20,732	21,865	4,206	4,475	3,493	3,635	212	221

TABLE 9 – DEVICES IN TV HOUSEHOLDS

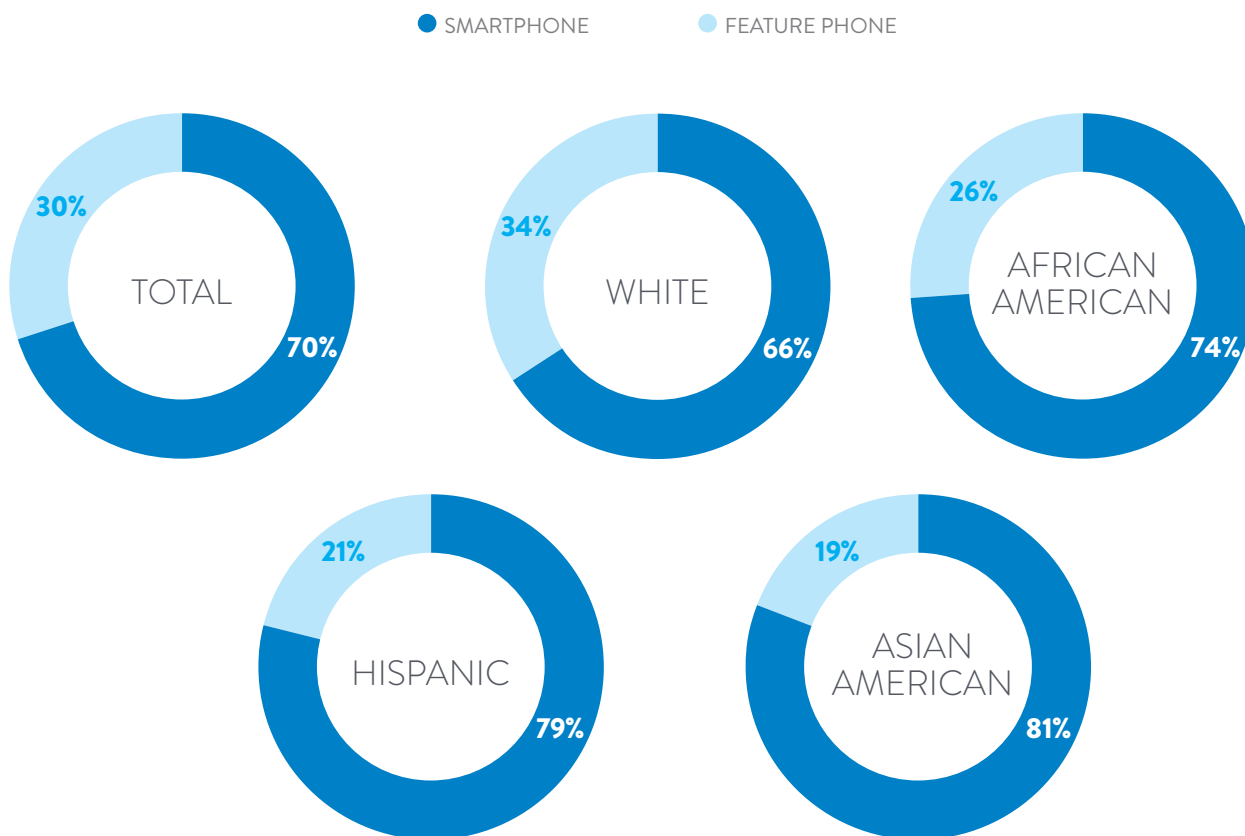
NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013	Q1 2014	Q1 2013
DVD/Blu-Ray Player	94,203	94,757	11,283	11,467	12,061	12,038	3,190	3,272
DVR	55,240	51,747	5,772	5,340	5,855	5,339	1,892	1,860
High Definition TV	99,231	91,308	11,789	10,862	13,418	12,300	4,046	3,837
Video Game Console	51,210	50,073	6,415	6,243	8,168	7,692	2,262	2,252
Tablet	37,570	23,117	3,647	2,138	4,435	2,336	2,113	1,627
Enabled Smart TV	10,212	5,166	857	451	1,366	646	821	464

TABLE 10 - TELEVISION DISTRIBUTION SOURCES BY ETHNICITY
PERCENTAGE OF HOUSEHOLDS

MARKET BREAK	COMPOSITE	WHITE	AFRICAN AMERICAN	HISPANIC	ASIAN AMERICAN
Broadcast Only	10%	9%	12%	16%	15%
Wired Cable (No Telco)	47%	47%	52%	38%	49%
Telco	11%	11%	11%	10%	15%
Satellite	30%	31%	24%	36%	17%
Broadband Only	2%	2%	1%	1%	4%

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 time-shifted 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 with at least one operable TV/monitor that receives video exclusively through a broadband internet connection 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 Apple TV, Boxee, Roku, Google Chromecast, or other internet connected device through the television. This does not include DVD / Blu-Ray Devices, Game Consoles, or Computers.

ENABLED SMART TV: A household with at least one television set that is capable and enabled to access the internet.

TELEVISION METHODOLOGY

On Traditional TV includes Live usage plus any playback viewing within the measurement period. Time-shifted 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 period. First Quarter 2014 Television data is based on the following measurement interval: 12/30/13-03/30/14. As of February 2011, DVR Playback has been incorporated into the Persons 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 January 2014, two factors led to an increase in "Watching Video on the Internet". Secure or "https" streaming of videos was added into reporting for entities such as Facebook. Additionally, YouTube mobile streams became included within the hybrid reporting.

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 Q1 of 2014. 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 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

Due to this methodology change from survey based data to EMM as of the Qtr 4 2013 report, 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, Time-shifted TV, DVD, Game Consoles, Multimedia Devices 12/30/13-03/30/14 via Nielsen NPOWER/NPM Panel, Online 01/01/14-03/31/14 via Nielsen Netview and Nielsen VideoCensus, Mobile 01/01/14-03/31/14 via Nielsen Electronic Mobile Measurement, Radio 01/03/13-12/04/13 via RADAR 120

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 120 data is based on P12+. Therefore, P2+ would be based on P18+ for Smartphone and P12+ for Radio.

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

Source: 01/01/14-03/31/14 via Nielsen NPOWER/Cross-Platform Homes Panel for P2+. Internet and Streaming based on home PC only.

TABLE 6 – SMARTPHONE VIDEO VIEWING QUINTILE

Source: 01/01/14-03/31/14 via Electronic Mobile Measurement for P18+. Smartphone video viewing quintiles are grouped based on users' time per person per month watching video on a Smartphone. It 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 12/30/13-03/30/14 via Nielsen NPOWER/NPM Panel.

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

Source: Traditional TV, Time-shifted TV, DVD, Game Consoles, Multimedia Devices 12/30/13-03/30/14 via Nielsen NPOWER/NPM Panel, Online 01/01/14-03/31/14 via Nielsen Netview, Mobile -01/01/14-03/31/14 via Nielsen Electronic Mobile Measurement, Radio 01/03/13-12/04/13 via RADAR 120

Exhibit 1 is based on users of each medium.

EXHIBIT 2 – MOBILE DEVICE PENETRATION BY ETHNICITY

Source: Mobile 01/01/14-03/31/14 via Nielsen Mobile Insights.

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

PAGES 4-7

RECENTLY TELECAST VOD - Defined as programming that is delivered on the VOD platform within 7 days of the original telecast of a show, with the same commercial load. Delivered this way, the viewing contributes to the linear telecast of the program for 7 days, including the Live+3 Day Commercial (C3) rating

SUBSCRIPTION VOD - refers to those with access to Netflix, Amazon Prime, and/or Hulu Plus. The collection of Subscription VOD in Nielsen's National People Meter panel (US only) began in Q2 2013. SVOD service is determined by a survey question which is asked during the initial demographic collection questionnaire and during the six month scheduled updates. In addition, households are asked to notify Nielsen of any changes to their SVOD status, and field can make updates at any time. Only households with Internet access are being asked this question.

RECENTLY TELECAST VIDEO ON DEMAND

Nielsen NPOWER, 031014-042014, Based on prime telecasts with recently telecast VOD contribution among externally reportable networks, includes only programming encoded for measurement, Live+7, P2+

SUBSCRIPTION VIDEO ON DEMAND

Nielsen NPOWER, NPM among TV homes, Profile - 031514, P2+; Share of viewership - 031014-031614, Prime, P2+



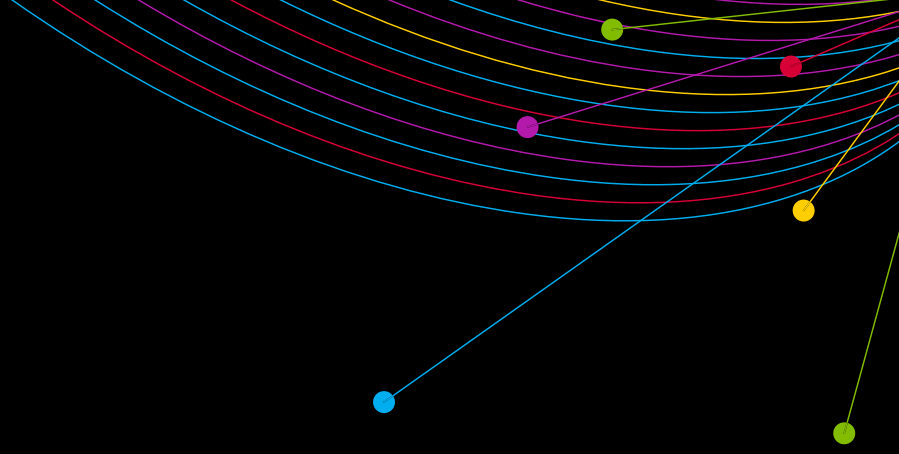
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