AN UNCOMMON SENSE OF THE CONSUMER™

FREE TO MOVE BETWEEN SCREENS

THE CROSS-PLATFORM REPORT

MARCH 2013

WELCOME

DOUNIA TURRILL
SVP INSIGHTS, NIELSEN

Our best-in-class audience measurement report provides you with a quarterly perspective on the evolution of the American consumer's media behavior. And to reflect the many changes in consumption we're showcasing the Cross-Platform Report in a new look that provides expanded data and deeper insight. As we strive to meet your need for sharper insight and broader data, we've included additional cuts of data that truly reflect the fabric of our country—the multi-ethnic consumers.

You will also find interesting facts on a small portion of American homes we call "Zero-TV" households: households that did not fit Nielsen's traditional definition of a TV household and will start to be included in our measured samples for the coming 2013-2014 season.

With this report, we hope you get a better understanding about how Americans are consuming media, just like we did.

Dounia

DOUNIA

As we reviewed the data for this past quarter, we found that Americans, irrespective of race, ethnicity and gender, have a voracious appetite for content. As an industry, we should feel fortunate to interact with so many consumers across devices and screens in unique and engaging ways. Finding the Holy Grail, however, means zeroing-in on the right touch points for each of your consumers.

As we highlight the differences in media use by age, race, ethnicity and gender, it's vital to strike a balance to ensure we deliver the right content to the right consumer (as well as on the right screen and at the right time). The average American spends more than 41 hours each week engaging with content across all screens and comparatively, the average African American spends close to 55 hours, Hispanics just over 35 hours and Asian Americans spend just over 27 hours. Knowing the numbers isn't enough, however. The key lies in knowing when and how viewers are consuming and interacting with that content; only then can you deliver your programming and advertising messages effectively.

For the consumer, it's about being entertained and staying informed. TV viewing trends remain significant and strong (viewers spent more time in Q4 2012 watching TV than in Q4 2011). Fourth quarter 2012 brought us the Presidential election and other significant news stories including Hurricane Sandy and the Newtown, CT tragedy demonstrating the appeal of the TV set. In fact, American viewing is growing and people are finding ways to extend the viewing hours in their days—thanks in part to developments in mobile and streaming technology.

Finding patterns and making sense of the fragmented consumption of video, we are focusing on the evolving definition of the television household. We continue to report time-shifted viewing via DVRs and video-on-demand as well as insights on the use of computers for surfing and streaming. However while a limited number of U.S. homes no longer receive TV programming via a traditional platform, as much as 75 percent of these homes still have TV sets they can use to watch entertainment, play games or surf the Internet.

So as we explore the array of consumer touch points, we seize the opportunity to broaden our audience measurement capabilities to reflect the ways in which consumers get their content. To that end, we will start including homes that have a broadband connection linked to a TV set in our measured samples.

These are exciting times. The consumer's content journey continues to enthrall and we will follow his path to discovery—one that enables him the freedom to connect in many places with the entertainment and information he wants.

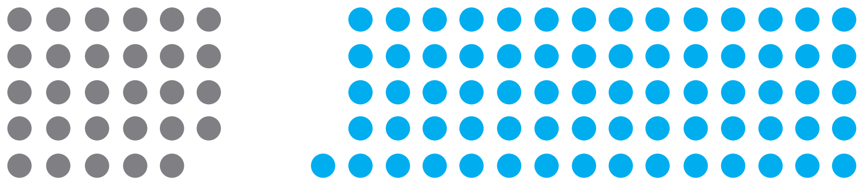
"AMERICAN VIEWING IS GROWING AND PEOPLE ARE FINDING WAYS TO EXTEND THE VIEWING HOURS IN THEIR DAYS"

VIDEO HOMES

In the next few pages you will find interesting facts on a small portion of American homes we call "Zero-TV" households. These households did not fit Nielsen's traditional definition of a TV household and will start to be included in our measured samples for the coming 2013-2014 season.

2,010,000
HOMES IN 2007

5,010,000
HOMES IN 2013



ACCOUNTING FOR LESS THAN 5% OF US HOUSEHOLDS, OVER THE LAST SIX YEARS NEARLY 2.5X MORE HOUSEHOLDS HAVE CHANGED THE WAY THEY GET THEIR CONTENT IN FAVOR OF USING OTHER DEVICES/SERVICES

WHAT DO THESE HOMES LOOK LIKE?

75% OF THESE HOMES HAVE AT LEAST ONE TELEVISION SET

Source: Nielsen "Zero-TV" Survey

"ZERO-TV"

67%

OF THESE HOMES
GET THEIR CONTENT
ON OTHER DEVICES

37% VIA COMPUTER

16% ON TV INTERNET

8% VIA SMARTPHONES

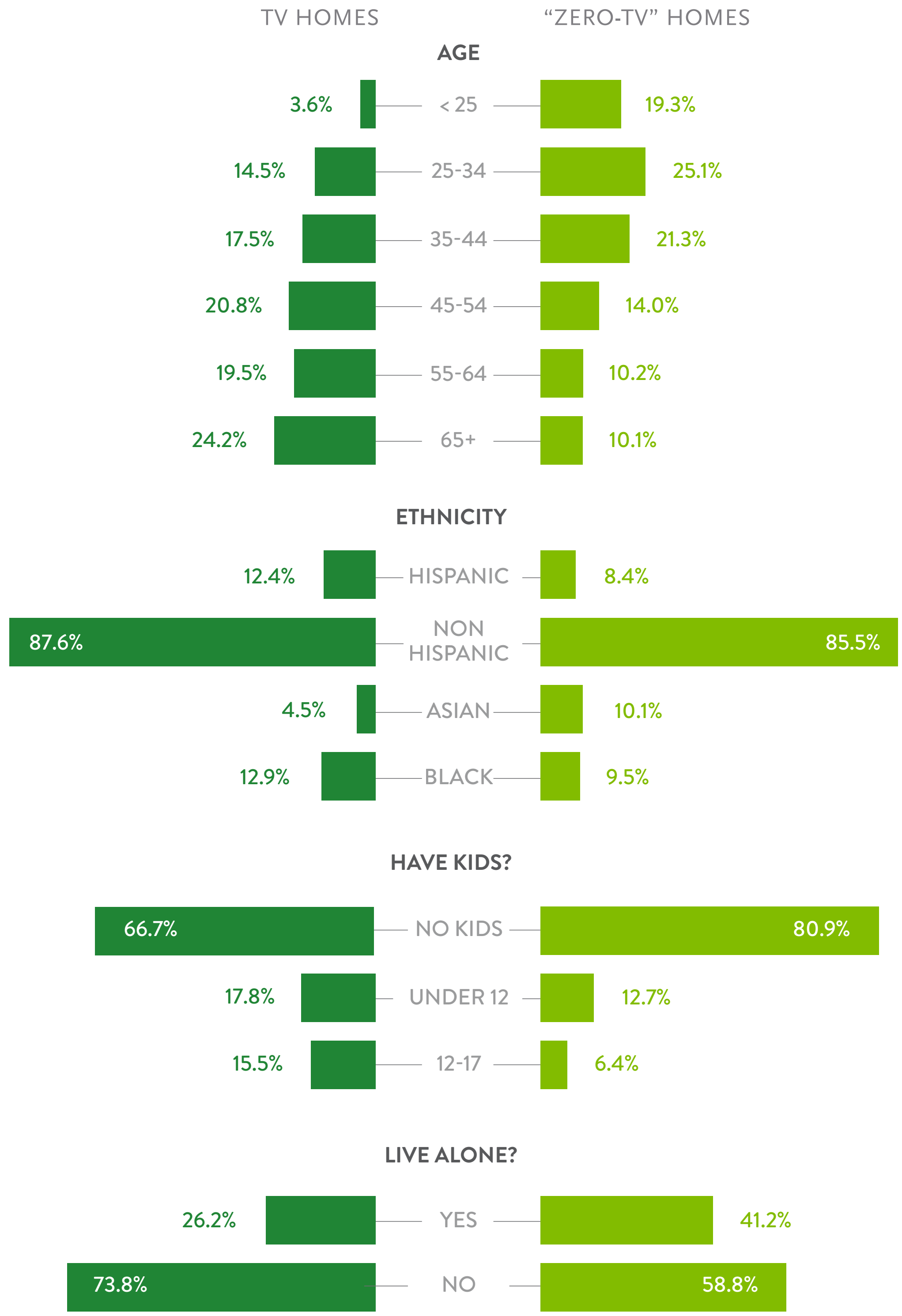
6% VIA TABLETS

48%

OF THEM WATCH
TV CONTENT THROUGH
SUBSCRIPTION SERVICES

Source: Nielsen "Zero-TV" Survey

THESE VIDEO HOMES TEND TO BE YOUNGER WITH ALMOST HALF UNDER THE AGE OF 35

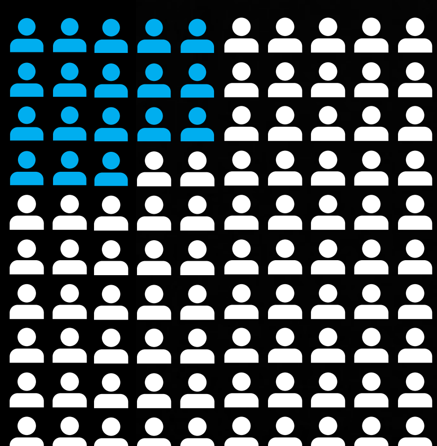


Source: Nielsen "Zero-TV" Survey

COST (36%) & LACK OF INTEREST (31%) ARE THE MAIN REASONS FOR "ZERO-TV" HOMES, WITH ONLY

18%

OF THESE HOUSEHOLDS CONSIDERING SUBSCRIBING TO TELEVISION SERVICES.



Source: Nielsen "Zero-TV" Survey

TAKING A CLOSER LOOK AT THE DATA

AVERAGE TIME SPENT PER PERSON PER DAY

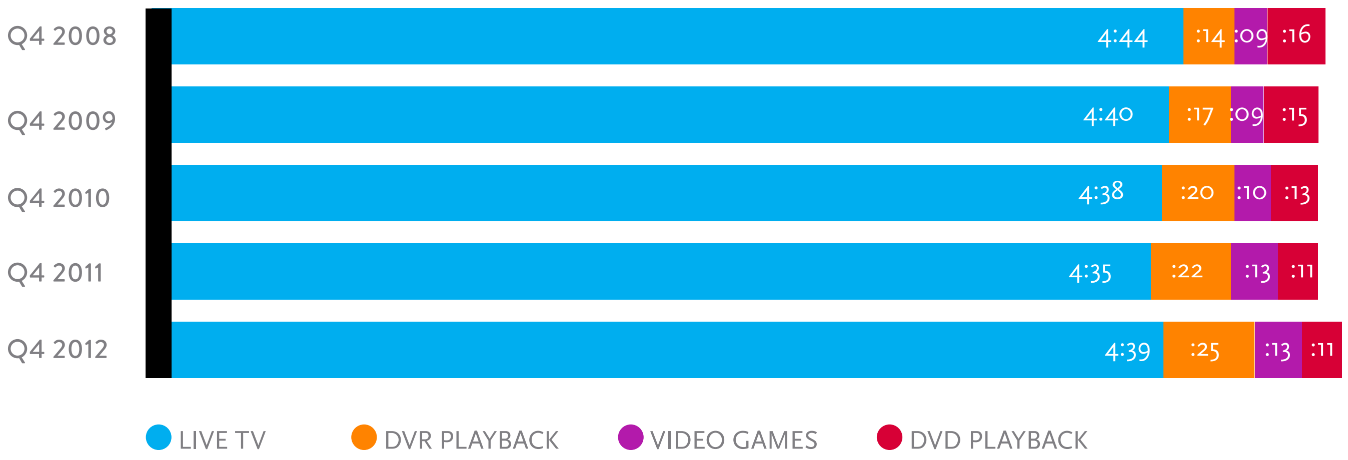


TABLE 1 – A WEEK IN THE LIFE FOR THE TOTAL US POPULATION

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+	BLACK 2+	HISP. 2+	ASIAN 2+
On Traditional TV	24:32	21:28	23:14	29:27	34:29	43:43	48:25	34:03	46:49	28:39	21:13
Watching Timeshifted TV	2:03	1:37	1:38	3:23	3:30	3:24	2:18	2:45	2:07	1:49	1:56
Using a DVD/ Blu Ray Device	2:01	1:05	1:09	1:38	1:18	0:56	0:32	1:14	1:21	1:15	0:58
Using a Game Console	2:15	3:27	3:02	2:10	0:54	0:16	0:04	1:26	1:48	1:36	1:03
Using the Internet on a Computer	0:29	1:08	6:09	7:08	6:40	5:48	3:22	4:44	4:38	3:21	3:49
Watching Video on Internet	0:14	0:29	2:04	1:45	1:10	0:48	0:18	0:57	1:13	1:00	1:13
Watching Video on a Mobile Phone	NA	0:24	0:28	0:21	0:10	0:03	0:00	0:11	0:19	0:21	0:24

TABLE 2 - OVERALL USAGE BY MEDIUM

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

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN	
	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011
On Traditional TV	283,930	284,455	36,981	37,093	47,276	46,153	15,868	15,764
Watching Timeshifted TV	159,685	143,881	19,376	17,077	21,028	17,399	7,905	7,195
Using a DVD/Blu Ray Device	152,831	157,561	18,188	18,875	24,492	25,991	7,778	8,924
Using a Game Console	97,130	96,774	12,677	12,652	17,290	15,753	5,801	6,037
Using the Internet on a Computer	212,359	212,659	25,182	23,534	28,084	25,259	7,541	6,920
Watching Video on Internet	162,213	165,712	19,110	18,223	21,796	19,908	6,092	5,681
Using a Mobile Phone	237,323	232,663	25,190	24,168	33,376	32,181	10,745	9,995
Watching Video on a Mobile Phone	40,887	33,526	6,062	4,751	9,492	6,921	3,120	2,406

TABLE 3 - MONTHLY TIME SPENT BY MEDIUM

USERS 2+ IN HOURS: MINUTES

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN	
	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011
On Traditional TV	156:24	153:19	215:02	209:08	131:08	127:47	99:30	95:41
Watching Timeshifted TV	12:38	11:44	9:45	8:59	8:21	7:09	9:06	8:08
Using a DVD/Blu Ray Device	5:39	6:00	6:12	7:02	5:41	6:26	4:33	5:15
Using a Game Console	6:35	6:43	8:17	7:51	7:22	7:05	4:56	6:40
Using the Internet on a Computer	29:23	28:55	31:33	30:52	26:01	24:55	38:19	37:37
Watching Video on Internet	7:43	5:15	10:54	7:24	9:58	6:41	15:01	10:05
Watching Video on a Mobile Phone	5:23	4:54	6:15	5:54	5:58	5:46	6:20	4:57

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	112:39	98:26	111:20	136:10	157:07	198:23	220:55	156:24
Watching Timeshifted TV	9:25	7:26	7:49	15:38	15:57	15:26	10:28	12:38
Using a DVD/ Blu Ray Device	9:16	4:59	5:32	7:34	5:54	4:16	2:28	5:39
Using a Game Console	10:19	15:47	14:31	10:00	4:04	1:14	0:18	6:35
Using the Internet on a Computer	5:05	9:20	35:49	36:25	33:48	32:40	25:35	29:23
Watching Video on Internet	3:45	5:26	15:08	11:04	7:31	5:54	3:02	7:43
Watching Video on a Mobile Phone	-	7:48	6:36	5:20	4:37	4:00	2:20	5:23

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	115:51	94:09	102:33	125:44	138:25	170:11	208:38	131:08
Watching Timeshifted TV	7:42	5:14	5:53	10:30	10:38	8:24	6:38	8:21
Using a DVD/ Blu Ray Device	8:51	4:43	5:04	6:44	4:33	4:15	2:36	5:41
Using a Game Console	9:37	16:15	12:51	7:30	3:06	1:25	0:38	7:22
Using the Internet on a Computer	5:22	12:10	33:31	33:08	29:29	26:05	26:58	26:01
Watching Video on Internet	4:47	5:57	14:40	12:24	8:43	9:08	8:51	9:58
Watching Video on a Mobile Phone	-	8:26	6:52	5:33	5:22	4:39	-	5:58

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	150:09	150:05	167:28	187:20	223:17	291:42	321:48	215:02
Watching Timeshifted TV	7:04	7:35	7:44	13:30	11:19	12:02	5:58	9:45
Using a DVD/ Blu Ray Device	6:52	5:15	5:40	7:34	6:47	6:51	2:22	6:12
Using a Game Console	10:53	19:59	16:25	10:56	3:59	1:29	0:35	8:17
Using the Internet on a Computer	5:41	10:07	42:47	37:43	36:47	31:24	26:17	31:33
Watching Video on Internet	3:41	5:24	19:53	13:17	9:25	9:51	6:57	10:54
Watching Video on a Mobile Phone	-	7:57	6:02	6:25	5:43	4:28	-	6:15

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

AMONG ASIANS

	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	75:08	62:51	79:57	89:03	97:47	115:53	173:33	99:30
Watching Timeshifted TV	7:04	5:50	7:06	10:23	12:08	9:23	6:45	9:06
Using a DVD/ Blu Ray Device	6:18	3:09	3:28	5:24	4:48	3:41	3:45	4:33
Using a Game Console	6:55	7:22	9:07	8:55	3:17	0:45	0:38	4:56
Using the Internet on a Computer	6:32	14:44	62:58	47:28	40:49	26:14	17:39	38:19
Watching Video on Internet	3:38	10:19	4:27	16:33	12:44	10:28	4:20	15:01
Watching Video on a Mobile Phone	-	7:54	8:00	6:32	4:15	-	-	6:20

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

	COMPOSITE				AFRICAN AMERICAN			
STREAMING QUINTILE	# 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	29,123	24.3	60.4	247.4	3,792	24.1	59.6	372.0
Stream 2	29,123	3.1	39.0	288.9	3,218	3.2	33.6	425.8
Stream 3	29,120	1.0	25.6	283.7	2,403	1.0	18.1	387.4
Stream 4	29,121	0.3	17.2	288.6	2,682	0.3	12.5	377.1
Stream 5	29,123	0.0	9.7	288.3	2,109	0.0	11.8	398.4
Non Streamers	92,071	0.0	1.5	253.7	10,238	0.0	1.5	344.4
All	237,681	3.5	19.3	269.5	24,442	4.3	18.5	372.0

	HISPANIC				ASIAN			
STREAMING QUINTILE	# 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	5,773	22.0	45.2	198.1	2,608	32.3	57.0	149.7
Stream 2	4,262	3.1	21.4	233.9	1,649	3.0	24.3	184.1
Stream 3	4,093	1.0	13.1	240.8	1,637	1.1	29.6	228.0
Stream 4	3,080	0.3	14.6	243.2	1,429	0.3	11.2	179.9
Stream 5	2,877	0.0	4.6	222.6	1,712	0.0	6.3	182.4
Non Streamers	14,976	0.0	0.7	216.4	6,435	0.0	1.6	158.9
All	35,061	4.2	13.7	221.2	15,470	6.0	17.8	171.8

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

	COMPOSITE				AFRICAN AMERICAN			
INTERNET QUINTILE	# 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	37,175	14.2	84.8	321.2	3,730	18.6	83.4	429.4
Internet 2	37,204	5.1	24.6	287.7	3,631	6.1	24.2	408.2
Internet 3	37,199	2.2	9.4	274.8	3,761	2.7	9.6	392.8
Internet 4	37,179	0.8	2.7	256.4	3,672	0.6	2.8	360.0
Internet 5	37,187	0.1	0.4	239.8	3,900	0.1	0.4	328.6
Non Internet Users	51,737	0.0	0.0	245.1	5,747	0.0	0.0	334.0
All	237,681	3.5	19.3	269.5	24,442	4.3	18.5	372.0

	HISPANIC				ASIAN			
INTERNET QUINTILE	# 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	3,624	21.1	79.8	239.1	2,218	26.7	88.2	172.1
Internet 2	4,397	8.4	24.9	225.1	2,077	10.9	25.2	177.4
Internet 3	5,838	4.2	9.7	221.6	2,162	3.1	8.9	197.4
Internet 4	5,715	1.3	2.7	224.4	2,194	1.1	2.6	182.6
Internet 5	5,278	0.2	0.4	215.7	3,140	0.3	0.4	156.6
Non Internet Users	10,208	0.0	0.0	213.7	3,678	0.0	0.0	159.8
All	35,061	4.2	13.7	221.2	15,470	6.0	17.8	171.8

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

	COMPOSITE				AFRICAN AMERICAN			
TELEVISION QUINTILE	# 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	47,341	3.2	28.6	635.4	8,725	4.4	24.5	667.9
Television 2	47,361	2.6	18.8	334.3	5,063	3.8	16.4	346.3
Television 3	47,338	2.8	17.1	212.4	4,001	4.5	15.6	221.2
Television 4	47,342	3.6	16.6	124.5	3,286	4.7	15.5	128.6
Television 5	47,351	5.4	15.2	39.7	3,316	4.5	12.8	45.1
Non Television Viewers	947	6.6	12.3	0.0	51	0.0	0.1	0.0
All	237,681	3.5	19.3	269.5	24,442	4.3	18.5	372.0

	HISPANIC				ASIAN			
TELEVISION QUINTILE	# 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	3,981	3.2	21.2	583.7	1,259	3.7	19.0	596.5
Television 2	7,048	3.2	12.3	333.1	2,174	2.3	16.3	326.0
Television 3	7,927	3.6	12.7	212.7	2,514	3.3	17.2	210.8
Television 4	8,353	5.0	13.0	126.5	4,012	4.9	17.9	119.5
Television 5	7,677	5.6	12.8	40.4	5,330	9.3	18.0	33.8
Non Television Viewers	73	2.2	2.3	0.0	181	29.2	28.7	0.0
All	35,061	4.2	13.7	221.2	15,470	6.0	17.8	171.8

TABLE 6 - TELEVISION DISTRIBUTION SOURCES

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN	
	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011
Broadcast Only	11,277	11,043	1,882	1,788	2,631	2,451	565	432
Wired Cable	57,805	60,473	7,734	7,953	6,512	6,565	2,107	2,205
Telco	9,882	8,452	1,223	1,038	1,061	879	557	549
Satellite	34,677	34,553	3,795	3,530	5,245	4,955	998	1,081

TABLE 7 – CABLE/SATELLITE HOMES WITH INTERNET STATUS

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN	
	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011
Broadcast Only and Broadband	5,121	5,122	463	408	829	925	455	308
Broadcast Only and No Internet/ Narrowband	6,291	5,911	1,338	1,326	1,660	1,432	102	105
Cable Plus and Broadband	78,071	79,238	8,054	8,172	8,442	8,124	3,320	3,406
Cable Plus and No Internet/ Narrowband	22,115	22,381	4,418	4,061	3,861	3,927	231	316

TABLE 8 – DEVICES IN TV HOUSEHOLDS

NUMBER OF HOUSEHOLDS (IN 000'S)

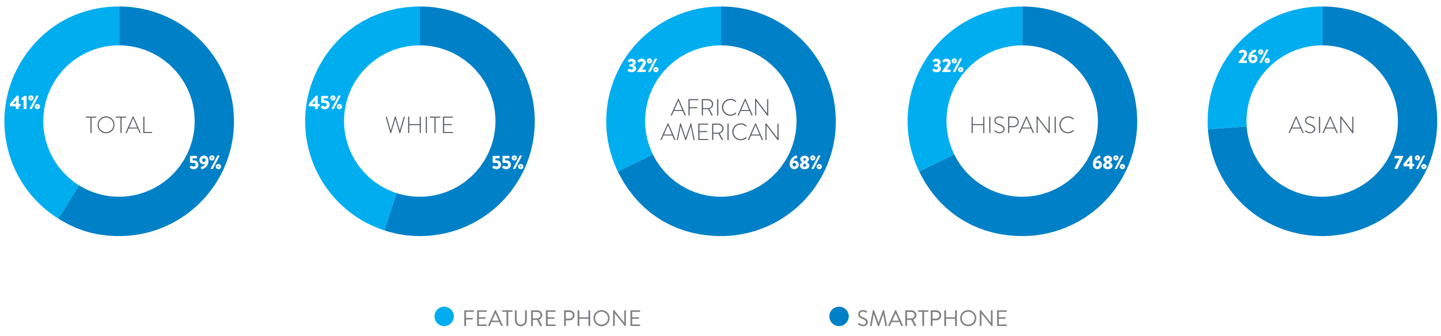
	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN	
	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011	Q4 2012	Q4 2011
Any DVD/Blu-ray Player	95,162	97,922	11,551	11,646	12,385	12,159	3,357	3,575
Any DVR	50,700	46,954	5,321	4,842	5,354	4,423	1,839	1,649
Any High Definition TV	89,316	80,223	10,627	8,983	12,162	10,394	3,783	3,364
Any Video Game Console	50,572	51,255	6,204	6,013	7,717	7,025	2,230	2,309
Any Tablet	19,791	n/a	1,849	n/a	1,877	n/a	1,371	n/a

TABLE 9 - TELEVISION DISTRIBUTION SOURCES

PERCENTAGE OF HOUSEHOLDS

MARKET BREAK	WHITE	AFRICAN-AMERICAN	HISPANIC	ASIAN
Broadcast Only	8%	11%	15%	13%
Wired Cable	51%	52%	43%	50%
Telco	9%	9%	8%	14%
Satellite	32%	27%	34%	24%

TABLE 10 – MOBILE DEVICE PENETRATION BY ETHNICITY



SOURCING & METHODOLOGIES

GLOSSARY

TV HOUSEHOLD: Nielsen now 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 delivered by broadcast signal or a paid TV subscription.

WATCHING TIMESHIFTED TV (only in homes with DVRs): A home where a physical DVR box is located and connected to the television.

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: 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: 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."

"ZERO-TV" HOUSEHOLDS: A household that did not fit Nielsen's traditional definition of a TV household and will start to be included in our measured samples for the coming 2013-2014 season.

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. In response to these services continued growth, for Q2 2012forward this report will no longer feature the "only in homes with DVRs," which was limited to physical DVR presence.

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. Fourth Quarter 2012 Television data is based on the following measurement interval: 10/01/12-12/30/12. 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 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 the release of the Chrome browser v.19 in May 2012, some Nielsen NetView data for a small number of sites that have extensive use of HTTPS is under reported for May and June 2012. A solution has been implemented for July 2012 reporting. This affects the "Using the Internet on a Computer" and"Internet" time spent figures provided in this report for current quarter data.

Yahoo! Mail and Yahoo! page view and duration data shows an artificial decrease for May-November 2011 and do not reflect the actual activity on these sites. This was corrected with December 2011 forward reporting. This affects the "Using the Internet on a Computer" and "Internet" time spent figures provided in this report for previous year data.

May 2012 volume metrics were affected for two YouTube channel entities. As of June 2012, YouTube Partner reporting became available through Nielsen VideoCensus featuring May 2012 data. YouTube Partner data is reported as individual channels under the YouTube brand in Nielsen VideoCensus. Data for each YouTube partner is aggregated across two entity levels, the broadest as Nielsen VideoCensus channel entity and the more granular being Nielsen VideoCensus client-defined entity. This affects the "watching video on the Internet" and "stream" numbers in this report for current quarter data.

MOBILE METHODOLOGY

Mobile video user projection, time spent and composition data are based on survey analysis of past 30 day use during the period. The mobile video audience figures in this report include mobile phone users (aged 13+) who access mobile video through any means (including mobile Web, subscription based,downloads and applications). Beginning in Q1 2012, data reflect enhanced methodology for calculating the Total Minutes spent watching video on a mobile phone. Total Minutes = (median#sessions)*(mean#minutes). All previous quarter/year metrics have been recalculated with new methodology. Data are trendable within this version of the report, but not to previous quarters' published editions.

Nielsen's mobile survey reports mobile video usage for those users 13 and older. Thus, 12-17 is T13-17 for all mobile data.

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 10/01/12 - 12/30/12 via Nielsen NPOWER/NPM Panel, Online 10/01/12 - 12/31/12 via Nielsen Netview and Nielsen VideoCensus, Mobile 10/01/12 - 12/31/12 via Nielsen Mobile Video Report/Mobile Insights

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

Source: 10/01/12 - 12/30/12 via Nielsen NPOWER/Cross-Platform Homes Panel for P2+.

TABLE 6, 7, 8–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 9 - TELEVISION DISTRIBUTION SOURCES - PERCENTAGE OF HOUSEHOLDS

Source: Based on the scaled installed counts for 10/01/12 - 12/30/12 via Nielsen NPOWER/NPM Panel.

TABLE 10 – MOBILE DEVICE PENETRATION BY ETHNICITY

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

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.

nielsen AN UNCOMMON SENSE OF THE CONSUMER™

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™