

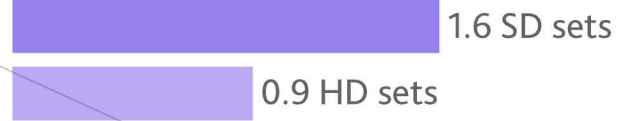
STATE OF THE MEDIA 2010
U.S. AUDIENCES
& DEVICES

nielsen
.....

Media Universe

Average number of TV sets per household¹

Total U.S.: 2.5 sets



SD homes: 2.1 sets



HD homes: 2.7 sets



How (and how much) we watch¹

1 week

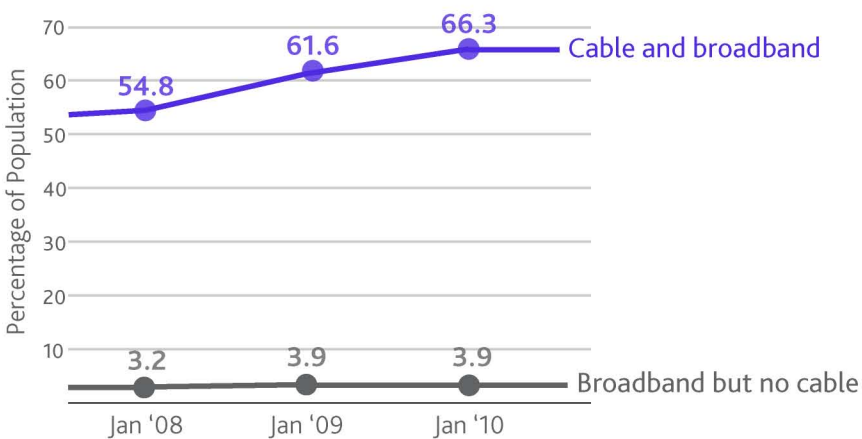
31%

of Americans own 4 or more television sets



Broadband vs. Cable²

While the percentage of consumers with broadband but no cable has remained relatively stable, presence of both cable and broadband has increased, indicating there is limited evidence of cord cutting.

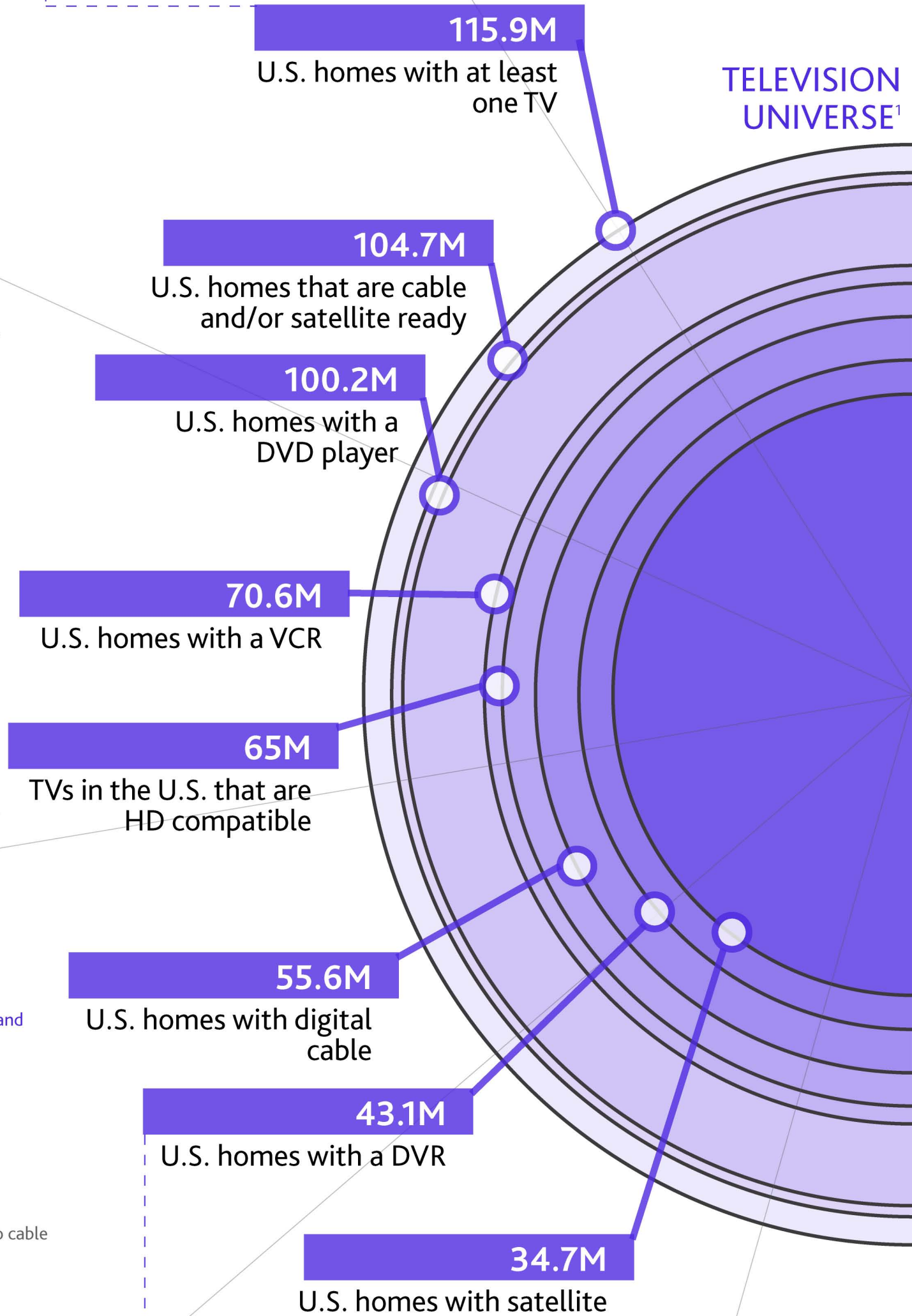


DVR PLAYBACK

21% of all viewing in DVR homes is DVR playback

45% of all recorded ads are viewed

2hr 9m of timeshifted TV is watched every week by DVR users



MOBILE PHONE UNIVERSE³

228M

Mobile phone users, 13+

83.2M

Mobile phone web users

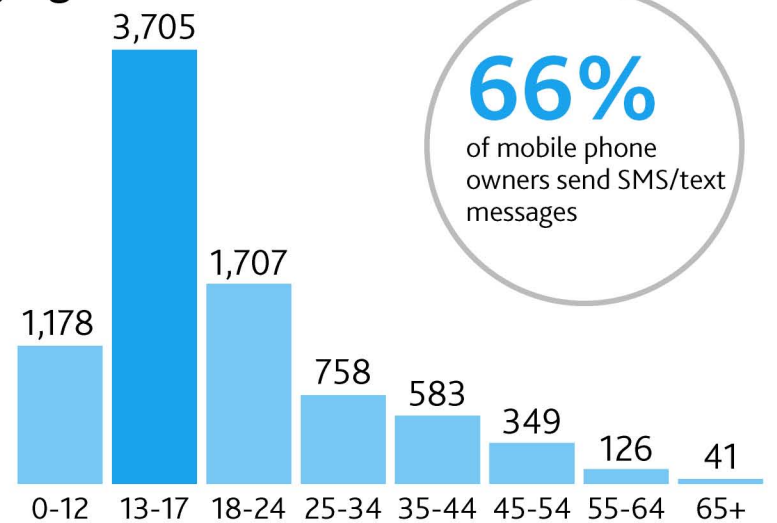
Top 10 Mobile Phones⁵

1. Apple iPhone 3GS
2. Samsung SCH-U450
Intensity, Doubletake
3. Motorola Droid
4. RIM Blackberry 8500 series
Curve 8520, 8530
5. Apple iPhone 4
6. Apple iPhone 3G
7. RIM Blackberry 8300 series
Curve 8310, 8320, 8330, 8350i
8. LG VX9200
enV3
9. Samsung SCH-U350 series
Smooth, Glint
10. RIM Blackberry 9700
Bold

Top 10 Mobile Video Channels⁴

1. YouTube
2. FOX
3. Comedy Central
4. ESPN
5. MTV
6. ABC
7. CBS
8. AdultSwim
9. NBC
10. Discovery Channel

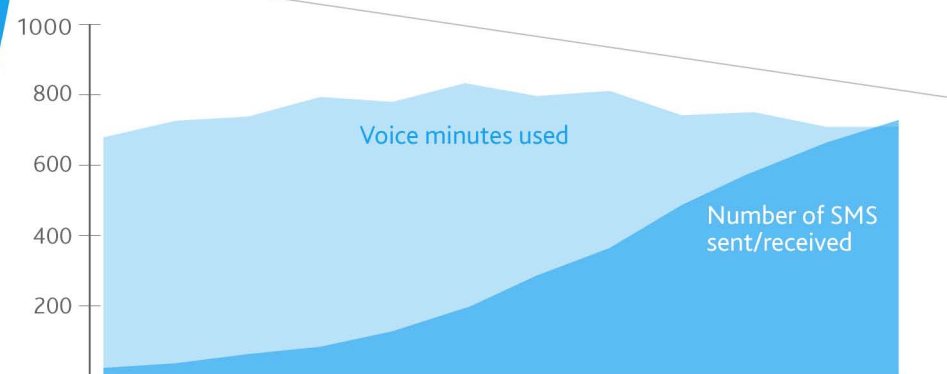
Number of SMS sent/received per month by age⁶



66%

of mobile phone owners send SMS/text messages

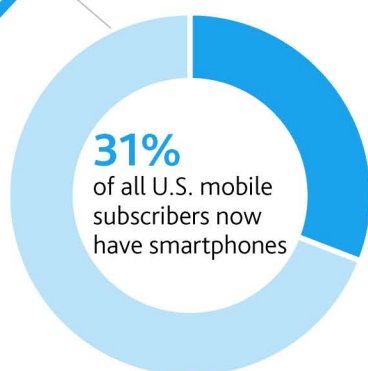
Mobile phone usage: Voice vs. SMS/texts⁷



While voice minutes used has remained relatively stable, text messaging activity has exploded.

Women talk and text more than men do⁶

In the U.S., women talk 28% more than men (818 minutes a month compared to men's 640); they text more, too, sending or receiving an average of 716 SMS messages a month compared to the 555 monthly text messages sent or received by the average American male.



WOMEN
818
minutes per month
716
texts per month

MEN
640
minutes per month
555
texts per month

U.S. mobile internet time by category⁹

Share of mobile internet time based on total time at an individual site-level*

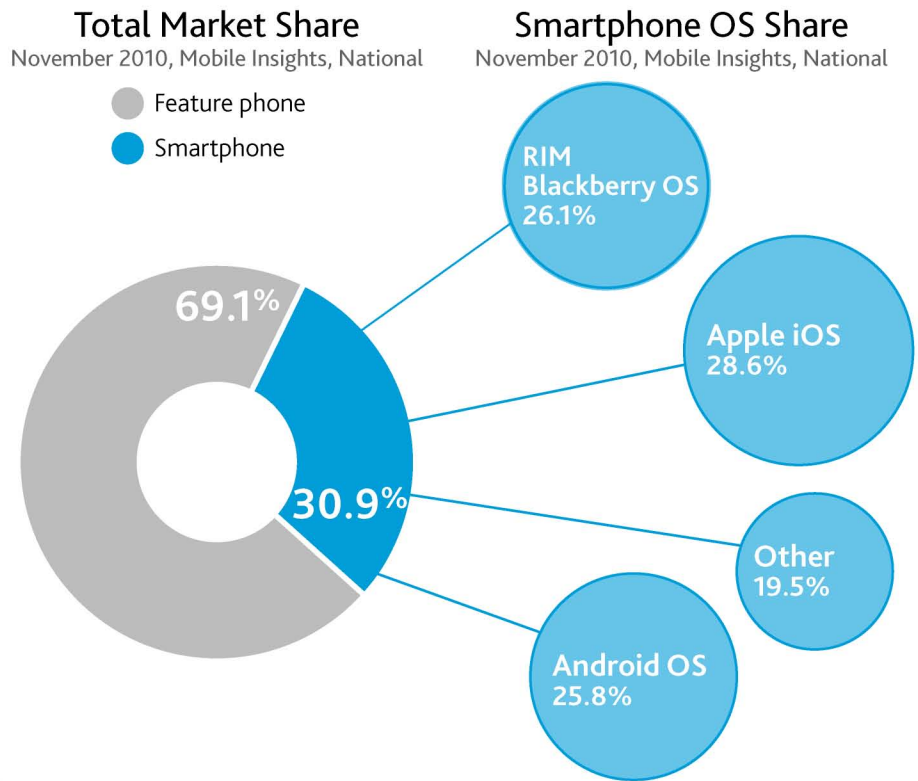
May 2010



The average number of apps that smartphone app downloaders have on their phones is **27**

Total U.S. mobile market & smartphone market¹⁰

While 40 percent of those who purchased a smartphone in the last six months chose one with the Android operating system (OS), when it comes to overall consumer market share, Android OS (25.8%) is still behind Apple iOS (28.6%). RIM Blackberry's position is less clear: Its share (26.1%) puts it within the margin of error of both Apple iOS and Android, making it statistically tied with both Apple for first and Android for third.



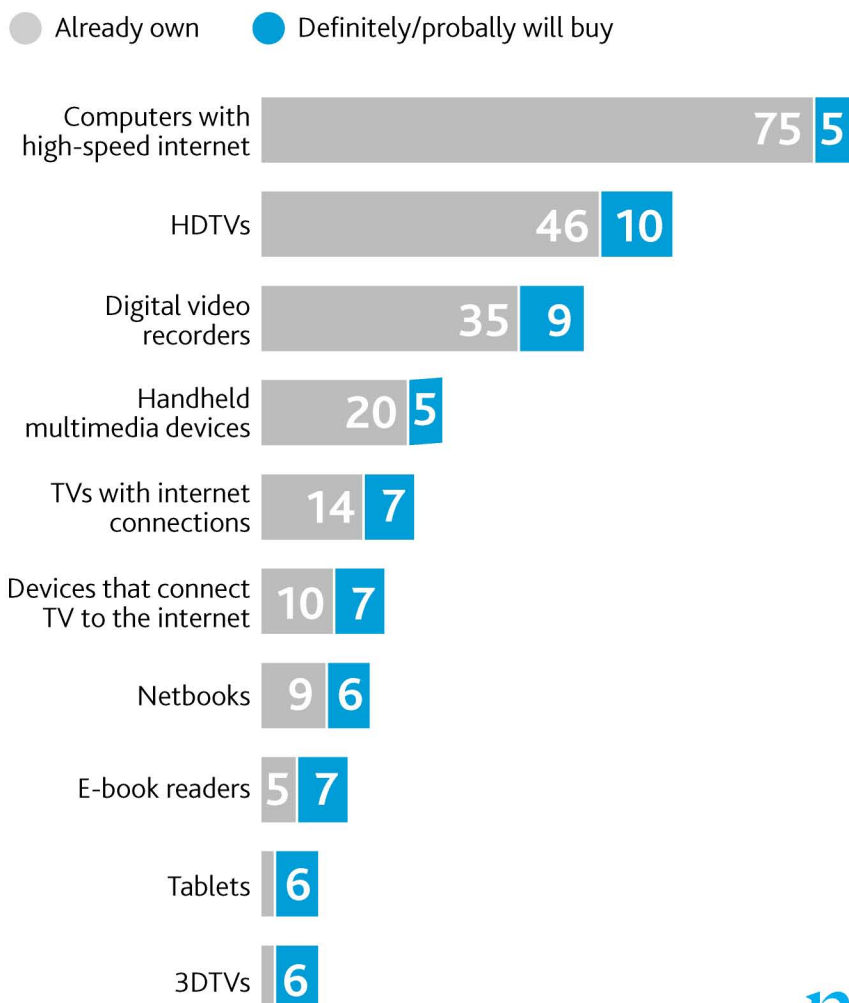
Intent to purchase a 3DTV in the next 12 months⁸

North America



Emerging media devices⁸

Adoption amongst "connected consumers" in the U.S.



Source

For the latest information about consumer media use please visit nielsenwire.com.

Please source all information to The Nielsen Company.

1 The Nielsen Company. Note: Data from Nielsen's National People Meter (NPM) sample in Sept. 2010.

2 The Nielsen Company. Note: Data from Nielsen's National People Meter (NPM) Sample from Jan. 2008 to April 2010.

3 The Nielsen Company. Data from Oct. 2010 Nielsen Mobile Media View Internet. Results collected from survey data.

4 The Nielsen Company. Note: Data from Oct. 2010. Results collected from survey data.

5 The Nielsen Company. Note: Data from Jan. to Sept. 2010. Top phones among consumers who have acquired a new device in the past year. Results collected from survey data.

6 The Nielsen Company. Data from Nielsen Consumer Value Metrics panel in Q3 2010. Results collected from analysis of over 60,000 phone bills in the U.S.

7 The Nielsen Company. Note: Data from Nielsen Consumer Value Metrics panel trending from Jan. 2005 to Sept. 2010. Results collected from a analysis of over 60,000 phone bills in the U.S.

8 The Nielsen Company. Note: Data from Nielsen's Global Online Survey conducted Sept. 2010. Nielsen surveyed 26,644 online consumers ages 15+ in 53 countries (with translation), but only U.S. and Canadian consumers are included here.

9 The Nielsen Company. Note: Data from May 2010. *The original share of time analysis was based on the average time spent at a category-level. **The Videos/Movies category refers to time spent on video-specific (e.g., YouTube, Yahoo! Videos, Hulu) and movie-related websites (e.g., IMDB, Blockbuster and Netflix) only. It is not a measure of video streaming or inclusive of video streaming on non-video-specific or movie-specific websites (e.g., streamed video on sports or news sites). **New Analysis.

10 The Nielsen Company. Note: Data from Nov. 2010. Results collected from survey data.