



How People Watch:
A Global Nielsen
Consumer Report
August 2010

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Video Consumption across Multiple Platforms is a Global Phenomenon

We inherit the word "television" from the initial breakthrough of transmitting images to vision, via telegraph wire. Of course, the definition was much clearer in 1904 when Dr. Arthur Korn of Munich University invented the machine that would transmit photographs over a long distance.

Commentators at the time imagined a world where doctors could diagnose patients from distant images or where cold weather denizens might "gloat over tropical vistas," but it is unlikely that anyone anticipated the ability to stream moving pictures on a device that fits in one's pocket. Today, thanks to the Internet, mobile technology and an unending well of content, it seems the full potential of video is finally being realized.

The history of video consumption has been additive. Consumers globally have proven their insatiable appetite for video-delivery of information and entertainment, and new means and screens have proliferated. Whether it be the standard TV, on the computer or on a mobile phone, viewership continues to grow, and will likely do so as new technologies enhance the experience and convenience.

To get a better sense for how the world is consuming video today, Nielsen recently completed a survey of more than 27,000 online consumers in 55 countries, asking simple questions about how they watch video¹. Looked at in the context of Nielsen's more detailed, syndicated measurement of video consumption across many markets, the result is a baseline understanding of the state of cross-platform video consumption amongst global online consumers.



¹For additional methodological information, please see "About this Report," at the end of this document.

Key Takeaways

- **Television:** is a universally important platform for video consumption, with consumers in many markets now spending 4+ hours per day watching television.
- **HDTV (High-Definition TV):** is improving the TV viewing experience for as many as 30% of global online consumers. Adoption is highest among older consumers and in North America, where HD content has proliferated.
- **Online Video:** approximately 70% of global online consumers watch online video; but North Americans and Europeans lag in adoption. More than half of global online consumers watch online video in the workplace.
- **Mobile Video:** is already used by 11% of global online consumers: penetration is highest in Asia-Pacific and among consumers in their late 20s.
- **Tablet PCs:** are expanding the definition of mobile video. Globally, 11% of online consumers already own or plan to purchase a tablet PC (such as an iPad) in the next year.
- **3DTV (Three-Dimensional TV):** will have a small but important audience: 12% of global online consumers own or have definite intent to purchase a 3DTV in the next year.
- **"Over the Top" TV:** televisions with Internet connections are gaining interest. About one in five (22%) global online consumers owns or has definite interest in buying a television with Internet connection in the next year.

Key Implications

- Consumption of video across multiple platforms is now a global phenomenon: marketers and media companies should be leveraging all opportunities to capture consumer attention.
- Amongst connected consumers, Asia Pacific consumers still have a slight lead on the adoption of online and mobile video, but there appears to be less regional variation in cross-platform video adoption than many believe. Businesses can no longer assume that market lag will buy them time.
- So far, tablet PCs and 3DTVs appeal to a small global audience: the importance of these affluent, cutting-edge audiences should be appreciated, but the influence of these technologies on near-term consumption of cross-platform video should not be overstated.
- If interest translates to acquisition, TVs with Internet connections will make "Over the Top" consumption a more viable option for consumers, presenting new opportunities for marketers and media companies to interact with consumers from the television screen.

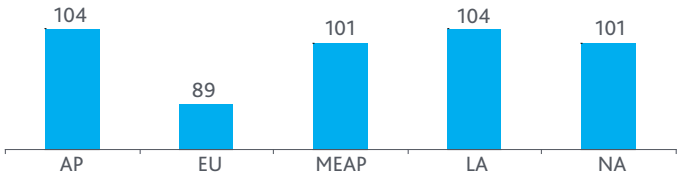
Television: The Most Widely Watched Screen

In an era of multiple viewing options, new technology has kept the living room relevant and in-home television remains the most widely used video screen around the world. Globally, 90% of online consumers use their in-home television at least once per month.

Penetration of TV was lowest in Europe, where respondents were 11 points less likely than the global population to say they had watched television in the past 30 days³.

Not all European markets in our survey indexed low on penetration of TV viewing, but in Germany and a number of adjacent, western European markets – Netherlands, Austria, Switzerland, Belgium – respondents were at least 26 points less likely to report watching television in the past 30 days.

Figure 1. Index³ of Home Television Usage (Past 30 Days) by Region²



Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

Figure 2. Index³ of Home Television Usage (Past 30 Days) by Market

Market	Index	Market	Index	Market	Index
Hong Kong	109	Singapore	102	Turkey	92
Brazil	108	Denmark	101	Czech Republic	91
China	108	Malaysia	101	Estonia	91
India	108	Ukraine	101	United Kingdom	91
Philippines	107	United States	101	Ireland	91
Italy	106	Argentina	100	Portugal	91
UAE	104	Australia	100	Greece	89
Columbia	104	Spain	98	Finland	86
Mexico	104	Saudi Arabia	98	Israel	86
Venezuela	104	South Africa	98	Japan	84
Vietnam	104	Canada	97	Sweden	83
Russia	103	Chile	97	France	82
Thailand	103	South Korea	97	Hungary	81
Egypt	102	Latvia	97	Belgium	74
Indonesia	102	Taiwan	97	Norway	74
Lithuania	102	New Zealand	96	Switzerland	70
Pakistan	102	Poland	94	Austria	69
Romania	102	Croatia	93	Netherlands	69
				Germany	68

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

²AP=Asia Pacific, EU=Europe, MEAP=Middle East, Africa and Pakistan, LA=Latin America, NA=North America; For more information on markets included in this analysis, please see "About this Report," at the end of this document

³Data in this report have been presented as indexes to global averages, where the global average for each response is set to 100. An index of precisely 100 would mean a demographic/region/market responded consistently with the global population. An index above 100 would mean a demographic/region/market "over-indexes," for something while an index below 100 would mean a demographic/region/market "under-indexes." Indexes can be read as a percentage comparison between a target group and the total population. For instance, an index of 110 would mean a target group was 10 points (or 10%) more likely than the total population. Alternatively, an index of 90 would mean a target group was 10 points (or 10%) less likely than the total population.

Our metered-measurement of TV viewing across 24 markets is consistent with the survey data in demonstrating the ubiquity of television consumption. In only one market measured, Puerto Rico, did television reach fall below 90 percent in March 2010.

Figure 3. Television Reach by Measured Market

	TV Reach (March 2010)
Taiwan	99.4%
Greece	99.0%
Philippines	98.8%
Mexico	98.5%
Indonesia	98.3%
Macedonia	98.1%
Serbia	97.8%
Slovenia	97.7%
Hungary	97.6%
Australia	97.5%
United States*	97.2%
Sweden	97.2%
Ireland	96.7%
Turkey	96.5%
New Zealand	96.5%
Poland	96.4%
Lebanon	96.0%
Malaysia	96.0%
Thailand	96.0%
South Korea	95.5%
China**	93.8%
Venezuela	93.1%
South Africa	93.0%
Puerto Rico	82.6%

Source: The Nielsen Company, Global Television Audience Measurement.

*United States estimate based on Q1 2010 monthly average. For all of the most current estimates of US cross-platform video consumption, please refer to Nielsen's US Three Screen Report

**China estimate for directional use only, based on China 3 Screen Shanghai Pilot, April 2010

The use of television is universal in the markets we measure, but a different story emerges when we consider the amount of time for which viewers tune in. Relying on Nielsen's electronically metered measurement of television consumption in 26 markets, Nielsen found that the highest daily TV time spent for March was in Serbia, where consumers averaged more than five-and-a-half-hours of TV viewing per day. Macedonia followed with five hours and 18 minutes per day, followed by

the U.S. and Greece following, each with just over five hours per day, per capita. Viewers in Thailand use their televisions least within Nielsen's metered markets: the typical Thai tunes in for just two hours and 11 minutes, or less than half the time spent in some of the leading markets.

With regard to time spent, the variation is not consistent across region, suggesting that the consumption of television is largely dependent on more country-specific factors. There are moderate, positive correlations of average daily viewing to both GDP and median age, but the list of factors which affect viewing levels by country is long and surely includes many cultural nuances as well.

Figure 4. Average Daily Time Spent Viewing Television by Person Across Measured Market

	hh:mm
Serbia	05:39
Macedonia	05:18
United States*	05:04
Greece	05:03
Croatia	04:49
Hungary	04:47
Italy	04:18
Turkey	04:17
Poland	04:14
Puerto Rico	04:06
Lebanon	03:41
Philippines	03:30
Slovenia	03:28
Mexico	03:22
Malaysia	03:18
South Africa	03:16
Sweden	03:10
New Zealand	03:08
South Korea	03:06
Ireland	03:05
Indonesia	03:01
Australia	02:59
Taiwan	02:41
China**	02:36
Venezuela	02:35
Thailand	02:11

Source: The Nielsen Company, Global Television Audience Measurement. Minimum reporting age is 4; except in Indonesia, New Zealand and Turkey (5); in Sweden (3); in Philippines and United States (2) and in Australia, Cyprus, Dominican Republic and Italy (0).

*United States estimate based on Q1 2010 monthly average. For all of the most current estimates of US cross-platform video consumption, please refer to Nielsen's US Three Screen Report

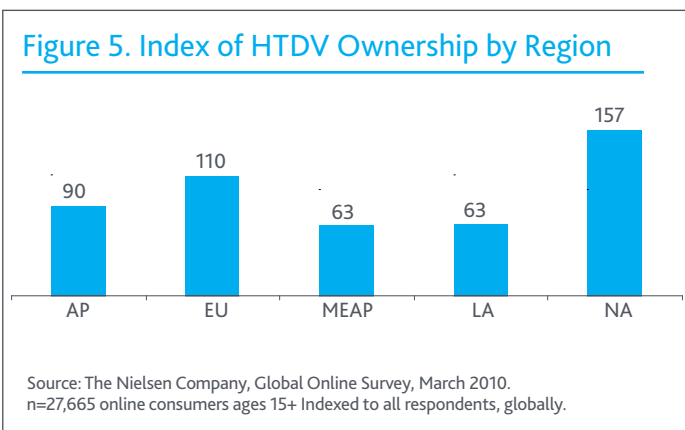
**China estimate for directional use only, based on China 3 Screen Shanghai Pilot, April 2010

Quality Drives Quantity: HDTV and the Global TV Experience

As screens proliferate, technology is enhancing the TV viewing experience for consumers around the world. High Definition Television, in particular, is keeping consumers tuned in.

Globally, 30% of respondents own a high-definition television set. Ownership indexes highest amongst adults 55–59—a critical age at which consumers have the disposable income and more time to enjoy the finer things in life.

To date, North America leads in the ownership of high-definition television sets. Dropping prices, a rapid onset of content and the adoption of Blu-ray players and next-generation video game consoles make North Americans 57% more likely than average to own an HDTV set, while consumers in Latin America and MEAP (Middle East, Africa and Pakistan) are 37% less likely to own one.



Though the Asia Pacific region on the whole under-indexes for HDTV ownership, some Asia-Pacific markets rise to the top in HD adoption. Hong Kong consumers are 60% more likely than the global online population to own an HDTV set—just behind the top market for HDTV, Australia, where consumers are nearly twice as likely as the global average to own an HDTV set.

⁴With regard to new technology interest, affirmative interest in Middle Eastern markets for HDTV (as well as 3DTV, Tablet computers and TVs with Internet Connections mentioned elsewhere in this paper) may be inflated by a known acquiescence bias: propensity to over-claim new product interest. That is, consumers in these markets may say “yes” to interest in new technology at a rate disproportionate to their interest.

In part, Australian penetration can be attributed to a lower-than-average standard of what is considered “high-def”: images in 576p are considered high definition in Australia, compared to the minimum 720p elsewhere in the world. Still, that shouldn’t discredit the rapid growth of high definition through Australia’s digital television services. Australian over-the-air digital television began in 2001 and all five national broadcasters were in DTV by July 2008, helping to spur adoption of advanced sets and tuners.

Figure 6. Index of High-Definition Television (HDTV) Ownership by Market

Market	Index	Market	Index	Market	Index
Australia	190	Sweden	113	Estonia	67
Hong Kong	160	China	110	Philippines	67
United Kingdom	157	Germany	110	Venezuela	67
United States	157	Netherlands	103	Brazil	63
Norway	143	Poland	100	Egypt	63
Canada	140	UAE	93	Hungary	63
Spain	140	Israel	93	South Africa	63
Italy	140	Portugal	93	Lithuania	60
Ireland	133	Romania	93	Malaysia	60
Singapore	130	Finland	90	Taiwan	57
Belgium	127	Vietnam	90	Columbia	53
Greece	123	Czech Republic	83	Ukraine	53
Switzerland	120	Croatia	83	Argentina	50
France	120	Mexico	83	Chile	50
Austria	117	Saudi Arabia	83	India	50
Denmark	117	Turkey	77	Japan	50
South Korea	117	Latvia	70	Thailand	50
New Zealand	113	Russia	70	Pakistan	47
				Indonesia	27

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally

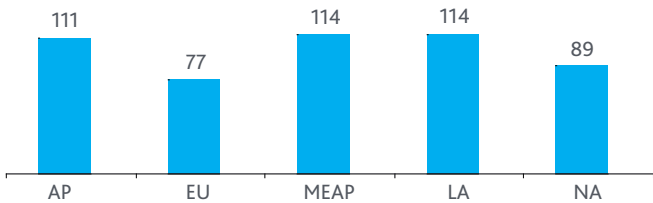
High-definition TV adoption should continue at a steady pace. Globally, 11% of consumers told us they had definite interest in acquiring one in the next year. While HDTV interest has been high in North America to date, there seems to be latent demand in Latin America, the Middle East and Asia Pacific. Latin American consumers in our study were nearly twice as likely to report definite interest in purchasing HDTV over the next year (index=191), while consumers in MEAP were 55% more likely to have definite interest in acquiring (index=155)⁴.

The New Clicker: Two-thirds of the World Tuning In on their Computers

As YouTube celebrates just its fifth anniversary this year, online video has already reached an astonishing point of ubiquity among online consumers. Globally, 70% of online consumers watched video over the Internet in March. Penetration is predictably highest among younger consumers.

Western markets still fall behind Asia Pacific, Latin America and the Middle East when it comes to online video. Today, Europe under-indexes for online video penetration by 23 points, while North America under-indexes by 11.

Figure 7. Index of Online Video Usage (Past 30 Days) by Region



Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.



Online video is most broadly watched among online consumers in China and Indonesia, where consumers are 26% more likely to use video. Conversely, online consumers in Germany, Belgium, France and Denmark are all at least 50% less likely to watch online video and consumers in Denmark are 70% less likely than the global population. In several of these lagging markets—Germany for instance— access to online video through the websites of traditional TV networks is just beginning and this introduction of premium online video content might still spur the pace of adoption.

Figure 8. Index of Online Video Usage by Market

Market	Index	Market	Index	Market	Index
China	126	Venezuela	111	New Zealand	90
Indonesia	126	South Korea	110	United States	90
Philippines	124	Ukraine	110	South Africa	90
India	121	Thailand	109	Australia	86
Mexico	121	Croatia	107	Estonia	84
Columbia	117	Taiwan	107	Hungary	83
Malaysia	116	Italy	106	Czech Republic	81
Pakistan	116	Singapore	106	Norway	79
Egypt	114	Poland	103	United Kingdom	76
Vietnam	114	Portugal	101	Turkey	67
Argentina	113	Lithuania	97	Sweden	66
Saudi Arabia	113	Latvia	96	Austria	56
UAE	111	Canada	93	Switzerland	53
Brazil	111	Finland	93	Netherlands	53
Chile	111	Spain	91	Germany	50
Hong Kong	111	Israel	91	Belgium	47
Romania	111	Greece	90	France	46
Russia	111	Ireland	90	Japan	46
				Denmark	30

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

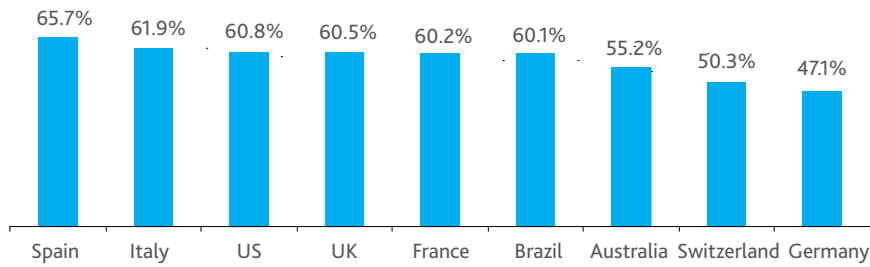
Nielsen's Online practice uses software metering to measure online activity around the world. This metered measurement across nine markets in March confirmed that penetration of online video is considerably below average in Germany and Switzerland.

As employers observe this trend, many in Europe and North America have put filters and policies in place to restrict video consumption by workers on the clock. The efforts seem to be paying off: consumers in North America and Europe were 40% and 33% less likely to consume video in the workplace, respectively, a wider regional gap than seen with online video overall.

On a market basis, workplace video consumption is most popular amongst online consumers in China, Hong Kong and India: consumers in each market were more than 45% more likely to watch online video at work.

In lower penetration online video markets such as Denmark, Germany and The Netherlands, usage at work is even more limited: in Denmark, for instance, online consumers are 84 points below the average for workplace video penetration.

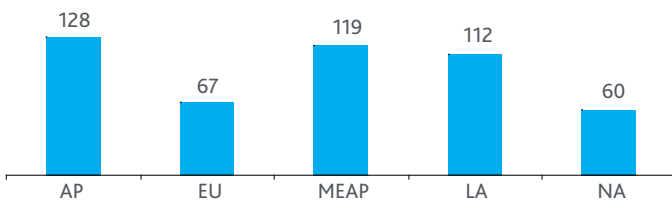
Figure 9. Metered Penetration of Online Video Sites by Market (March 2010)



Source: The Nielsen Company, Nielsen NetView, March 2010

Online video has extended video consumption to the workplace. Globally, 57% of respondents report having watched online video on their computer at work—higher amongst younger consumers who have grown accustomed to accessing video whenever, wherever they want it.

Figure 10. Index of Video Consumption on Computer at Work (Past 30 Days) by Region



Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

Figure 11. Index of Video Consumption on Computer at Work (Past 30 Days)

Market	Index	Market	Index	Market	Index
China	151	Romania	112	Spain	67
Hong Kong	147	Croatia	111	Australia	65
India	146	Singapore	111	Finland	65
Thailand	137	Ukraine	109	Hungary	63
Vietnam	133	Chile	107	Norway	61
Mexico	132	Argentina	105	New Zealand	61
Saudi Arabia	130	Brazil	105	Sweden	61
Philippines	128	Poland	95	United States	60
Malaysia	125	Italy	93	Canada	56
Pakistan	125	Portugal	91	Ireland	56
Taiwan	123	Greece	89	United Kingdom	54
UAE	119	Israel	89	Japan	46
Indonesia	119	Czech Republic	88	Switzerland	42
Columbia	118	Lithuania	88	France	42
Egypt	116	Latvia	88	Austria	39
South Korea	116	South Africa	88	Belgium	39
Russia	114	Turkey	86	Netherlands	32
Venezuela	114	Estonia	79	Germany	28
				Denmark	16

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

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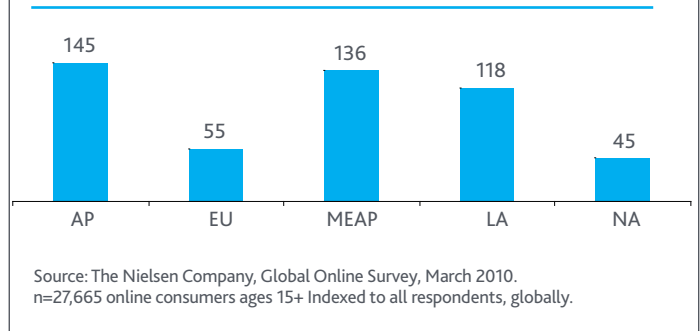
Mobile Video: Millions Tuned in to Their Phone, but Adoption Still Varies Greatly

Nowhere in our survey of video consumption did we find broader variation than in mobile viewership. For many, the jury is still out on mobile as a video platform, but our research proves that for millions of consumers around the world, the phone is already an important viewing screen. Globally, 11% of online consumers watched some video or mobile TV on their phone in March.

Mobile video adoption varies widely by gender (men over-index by 18% while women under-index by 9%) and age (adults 25-29 over index by 73% while adults 60-64 are 73% less likely to use it)⁵.

As with online video, Europe and North America lag in mobile video adoption. While Asia-Pacific online consumers are 45% more likely to use mobile video and MEAP consumers 26% more likely, North Americans and Europeans lag by 55% and 45%, respectively. Often the lag of mobile media adoption in North America and Europe is attributed to the advanced mobile cultures in comparative markets, but it should also be noted that, with regard to video especially, the proliferation of other screen choices also impacts relative mobile video consumption. That is to say, slower mobile video adoption in North America and Europe may as much be attributed to the technological advancement and ubiquity of other screens in these markets as it is to the proliferation of mobile technology in more advanced mobile media markets.

Figure 12. Index of Mobile Video Usage (Past 30 Days) by Region



⁵Though indexing against ages and markets helps to show variations in mobile video penetration, it should be noted that indexes are against small global penetration estimate: 11%. Mobile video penetration, across demographics and regions, remains modest.

Figure 13. Index of Mobile Video Usage (Past 30 Days)

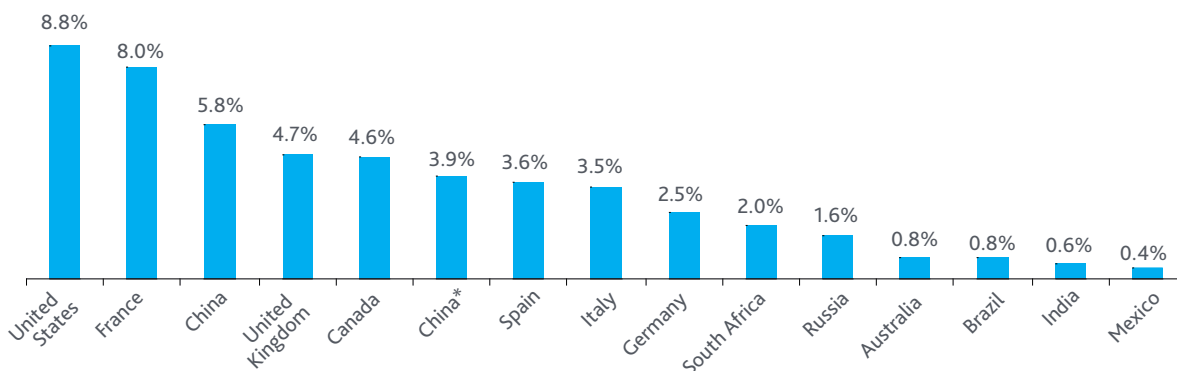
Market	Index	Market	Index	Market	Index
Philippines	182	Hong Kong	91	Sweden	45
Indonesia	173	Japan	82	Ireland	45
China	173	South Korea	82	Estonia	45
India	164	South Africa	82	Croatia	45
Singapore	155	Lithuania	82	Austria	45
Egypt	155	Taiwan	73	Switzerland	36
Brazil	155	Latvia	73	Portugal	36
UAE	145	Israel	73	Netherlands	36
Vietnam	136	France	73	Finland	36
Thailand	136	Turkey	64	Czech Republic	36
Saudi Arabia	136	Romania	64	Australia	36
Pakistan	136	Italy	64	Spain	27
Venezuela	118	Chile	64	Norway	27
Mexico	118	United States	55	New Zealand	27
Ukraine	109	Poland	55	Denmark	27
Malaysia	100	Greece	55	Canada	27
Columbia	100	Argentina	55	Hungary	18
Russia	91	United Kingdom	45	Belgium	18
				Germany	9

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

11% of online consumers say they've watched video on their phone, but use varies widely by age, gender and region.

Nielsen measures mobile media activity in greater detail across 15 markets. Comparing penetration rates from the syndicated products and the global omnibus survey, which employed the same survey language, our syndicated products confirm that North America and Europe lag somewhat in mobile video consumption: in the 15 markets for which we track mobile, the U.S. leads in terms of use with 8.8%, but that penetration still falls below our global survey estimate of 11%.

Figure 14. Syndicated Mobile Video Penetration by Market Q4 2009–Q1 2010



Source: The Nielsen Company, Telecom Practice
 *China estimate for directional use only, based on China 3 Screen Shanghai Pilot, April 2010

**New Screens and Connections:
Will Consumers be Interested?**

Going forward, a three screen look at video consumption (analyzing just TV, Online and Mobile) will no longer be sufficient. New video-friendly screens and delivery mechanisms have been introduced that will add greater complexity to the video landscape in the very near term. This year the industry is paying considerable attention to tablet PCs, 3DTV and Over-the-Top consumption. Though interest on all three in our survey is tepid, each presents new opportunities for consumers, media companies and marketers and could materially impact video consumption.

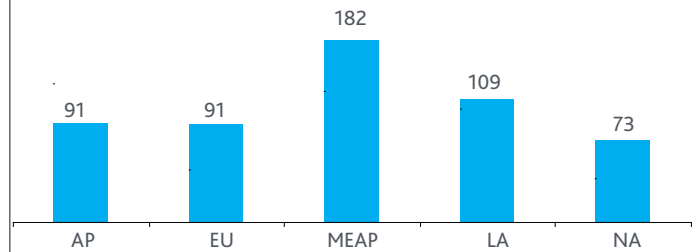
Tablets

At the beginning of 2010, analysts aplenty were speaking about the tablet and a screen void it would fill between TV, PC and mobile. With the successful introduction of the iPad, it is clear to many that this technology has arrived. What is less clear is consumer interest in filling that screen void.

In our survey, just 11% of global online consumers said they either presently own or have definite interest in owning a tablet PC such as an iPad in the coming year. Interest is highest amongst consumers 25-29 and lowest amongst consumers over the age of 65.

So far interest in tablets is highest in MEAP markets, particularly the Middle East, though an acquiescence bias might exaggerate consumer interest there. Somewhat ironically, consumer interest in tablet PCs is so far lowest in North America, the very region that brought the iPad to the world. Online North Americans are 27% less likely than the global online population to own or have definite purchase intent for a tablet PC.

Figure 15. Index of Ownership + Definite Purchase Intent for Tablet PC by Region



Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

Figure 16. Index of Ownership + Interest in Tablet PCs by Market

Market	Index	Market	Index	Market	Index
Pakistan	209	Russia	118	Czech Republic	64
Saudi Arabia	200	Ukraine	118	Denmark	64
Egypt	191	Estonia	109	Ireland	64
Taiwan	191	Indonesia	109	Lithuania	64
Venezuela	173	Chile	100	Poland	64
Italy	155	Greece	100	Singapore	64
Germany	155	Philippines	100	Canada	55
India	155	Brazil	91	Japan	55
UAE	145	China	91	Spain	55
Austria	145	Netherlands	91	Sweden	55
Hong Kong	145	Thailand	91	Belgium	45
Mexico	145	Croatia	91	France	45
Vietnam	145	Malaysia	82	United Kingdom	45
Romania	136	Switzerland	82	Norway	45
Columbia	127	Turkey	82	New Zealand	45
Latvia	127	United States	82	Australia	36
Argentina	118	South Africa	82	Portugal	36
Israel	118	South Korea	73	Finland	27
				Hungary	27

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally

3DTV

The cross-platform video experience is changing as new screens are added to the ecosystem, but it is also continually affected by the improvements made to existing screens. In recent years, HDTV has been a strong example of this. As noted above, HDTV has helped to keep the living room relevant as new screens proliferated. To a much more limited extent, 3DTV may have the same effect: trumping the experience of smaller, more portable screens and providing an unrivaled video viewing experience. 3DTV was first broadly talked about this year when nearly all international TV manufacturers demonstrated 3DTV capabilities at the Consumer Electronics Show and ESPN launched ESPN 3D in time for the World Cup. So while there's a great deal of buzz around 3DTV, is the interest there?

Globally, 12% of online consumers told us they own or have definite interest in purchasing a 3DTV. While that may not seem like much, compared to some other emerging technology, this represents a sizable opportunity to attract the eyeballs and investment of some of the world's most affluent TV households. Interest and intent is highest amongst consumers ages 25-29, and so far stronger in MEAP and Latin American markets than in Europe and North America.

Figure 17. Index of Ownership + Definite Purchase Intent for 3DTV by Region

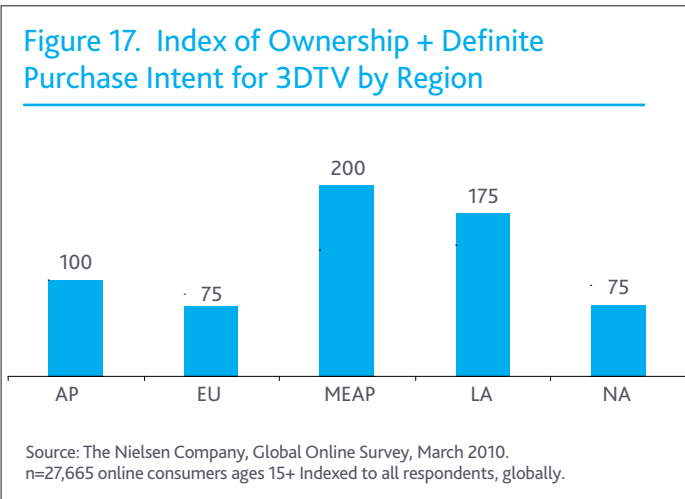


Figure 18. Index of Ownership + Interest in 3DTV by Market

Market	Index	Market	Index	Market	Index
Saudi Arabia	233	South Africa	117	Ireland	58
Columbia	217	South Korea	100	Lithuania	58
Egypt	217	Ukraine	100	Malaysia	58
Venezuela	217	Austria	92	Singapore	58
Pakistan	200	Germany	92	Czech Republic	58
Vietnam	192	Italy	83	Belgium	50
India	183	Poland	83	Canada	50
Mexico	183	Romania	83	Latvia	50
Brazil	175	Netherlands	83	Denmark	42
UAE	158	Switzerland	75	Estonia	42
Argentina	142	United States	75	Hong Kong	42
Chile	142	France	67	Hungary	42
Philippines	133	Greece	67	Norway	42
Russia	125	Israel	67	Taiwan	42
Turkey	125	Portugal	67	Australia	33
Indonesia	117	Spain	58	New Zealand	33
China	117	United Kingdom	58	Finland	25
Thailand	117	Croatia	58	Sweden	25
				Japan	17

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally



TVs with Internet Connections

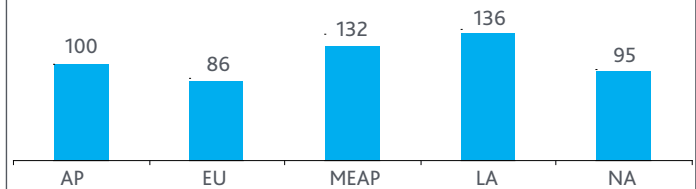
It's not just the addition and improvement of screens that will affect global video consumption, but the new ways by which consumers interact with screens.

One of the biggest looming advances is the connection of TVs to broadband. Already, stand-alone boxes and broadband-ready TVs make it possible for consumers to watch video and consume other content "over the top," by accessing Web content on their TV screen via broadband. Increasingly, consumers shopping for new TVs will be confronted with connectivity as an option: one US electronics retailer already has 64 such models available.

Consumers have an appetite for this connection: about one in five (22%) global online consumers owns or has a definite interest in purchasing a TV with Internet connection in the next year. Interest is fairly consistent across demographics but varies somewhat by region. MEAP and Latin American consumers express the most interest in TVs with Internet connections while interest lags just slightly in Europe.

Today, much of the content these consumers will access through their connected TVs will be through a walled garden: widgets and apps that make video clips, sports scores, social networks and streaming music available in limited ways. As connected TVs open up, though, the availability of full web content and streaming video on the household's largest, best screen could blur the line between TV and PC.

Figure 19. Index of Ownership + Definite Purchase Intent for TV with Internet Connection by Region



Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally.

Figure 20. Index of Ownership + Interest in TVs with Internet Connection by Market

Market	Index	Market	Index	Market	Index
Columbia	195	Israel	100	Ukraine	82
Venezuela	164	Romania	100	United Kingdom	77
Chile	155	United States	100	Netherlands	77
Mexico	145	South Africa	100	Singapore	77
Pakistan	145	Spain	95	Australia	73
Argentina	141	Belgium	95	Germany	73
UAE	136	Switzerland	95	Indonesia	73
Vietnam	136	France	91	Japan	73
Saudi Arabia	132	Lithuania	91	Czech Republic	68
Egypt	127	Latvia	91	Denmark	68
India	123	Thailand	91	Hungary	68
South Korea	123	Austria	86	Greece	59
Brazil	114	Ireland	86	Hong Kong	59
Portugal	114	Norway	86	Croatia	59
Russia	114	Canada	82	New Zealand	59
Estonia	109	Italy	82	Sweden	55
China	105	Poland	82	Taiwan	50
Philippines	105	Turkey	82	Malaysia	45
				Finland	41

Source: The Nielsen Company, Global Online Survey, March 2010. n=27,665 online consumers ages 15+ Indexed to all respondents, globally

22% of online consumers own or have a definite interest in a TV with an Internet connection.

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The Global Cross-Platform Evolution

Video transmission has come a long way since we were sending and receiving images via telegraph in 1904. For that matter, video transmission has changed dramatically in the last decade, alone. Over the course of these periods, consumers have adopted new video screens and experiences with open arms.

Consumers still watch television to the tune of multiple hours per day, but increasingly that television is high-definition and connected to a digital video recorder. As we move into the next decade, more televisions will be connected to the Internet and many will be displaying images in three dimensions: technologies in which consumers already express considerable interest. Concurrently, online video is approaching ubiquity and mobile video is becoming a viable option for millions, even while new devices such as tablets are promising to change our very definition of mobile video.

The adoption of cross-platform video is not unique to certain markets or demographic groups, though. While technological and cultural variations put some markets ahead of others, online consumers in all corners of the globe have demonstrated their appetite for anytime, anywhere video consumption. For media companies, marketers and researchers, a boundary-less perspective on cross-platform consumption has never been more important.

About this Report

This paper is based primarily on a series of media usage questions included in Nielsen's Global Online Survey 1H 2010, conducted online between March 8 and March 26, 2010. The survey polled more than 27,000 consumers across 55 countries throughout Asia Pacific, Europe, Latin America, the Middle East 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 with a maximum margin of error of $\pm 0.6\%$

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. Additionally, as recent research from the Nielsen-funded Council for Research Excellence showed, consumers may have a tendency to under-report television consumption and over-report consumption of video on new platforms such as online and mobile. To a limited extent, this bias may vary by region, as well. These results are not weighted for acquiescence bias. Accordingly, these data are presented primarily as indexes and the results are most appropriately considered comparatively by age, region or country, within individual media. The result is a broad, directional perspective on global video consumption.

Where available and as noted, we have supplemented the Nielsen Global Online Survey data with our syndicated measurement of media consumption by market.

A Note About Worldwide Internet Penetration

This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by geographic region as reported by Internet World Stats:

North America	76.2%
Oceania/Australia	60.8%
Europe	53.0%
Latin America/Caribbean	31.9%
Middle East	28.8%
Asia	20.1%
Africa	8.7%
World Average	26.6%

Countries Surveyed

AP (Asia Pacific)	
Country	Abbr.
Australia	AU
China	CN
Hong Kong	HK
India	IN
Indonesia	ID
Japan*	JP
Malaysia	MY
New Zealand	NZ
Philippines	PH
Singapore	SG
South Korea	KO
Taiwan	TW
Thailand	TH
Vietnam	VN

EU (Europe)	
Country	Abbr.
Austria	AT
Belgium	BE
Croatia	HR
Czech Republic	CZ
Denmark	DK
Estonia	EE
Finland	FI
France	FR
Germany	DE
Greece	GR
Hungary	HU
Ireland	IE
Israel	IL
Italy	IT
Latvia	LV
Lithuania	LT
Netherlands	NL
Norway	NO
Poland	PL
Portugal	PT
Romania	RO
Russia	RU
Spain	ES
Sweden	SE
Switzerland	CH
Turkey	TR
United Kingdom	GB
Ukraine	UA

MEAP (Middle East, Africa, Pakistan)	
Country	Abbr.
Egypt	EG
Pakistan	PK
Saudi Arabia	SA
South Africa	ZA
UAE	AE

LA (Latin America)	
Country	Abbr.
Argentina	AR
Brazil	BR
Chile	CL
Columbia	CO
Mexico	MX
Venezuela	VE

NA (North America)	
Country	Abbr.
Canada	CA
United States	US

About The Nielsen Company

The Nielsen Company 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 assets. The privately held company has a presence in approximately 100 countries, with headquarters in New York, USA. For more information, please visit, www.nielsen.com.

For More Information on this report or Nielsen's global measurement of video consumption, please contact your Nielsen representative or:

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