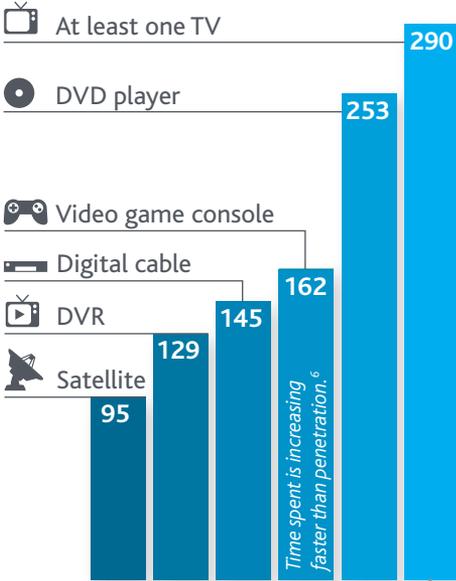


STATE OF THE MEDIA:  
CONSUMER USAGE REPORT  
*2011*

# The U.S. Media Universe

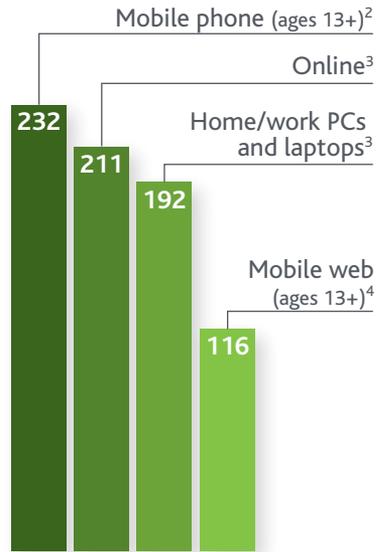
## DEVICE OWNERSHIP<sup>1</sup>

(millions of people who own)



## MOBILE & ONLINE CONSUMERS

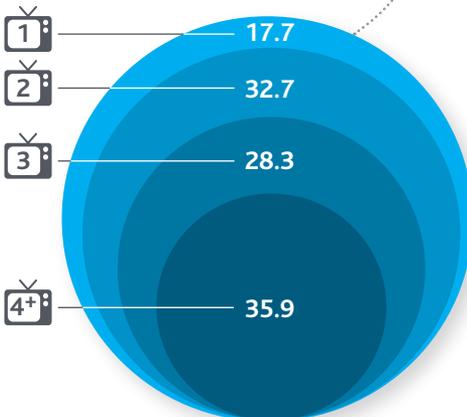
(millions of users)



## HOUSEHOLDS WITH TVS

(millions of households)<sup>1</sup>

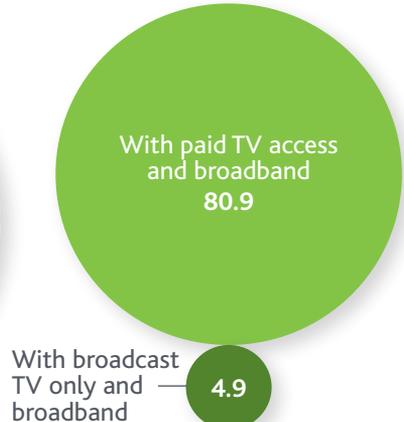
At least 1 TV — 114.7 million



## HOUSEHOLDS W/ BROADBAND

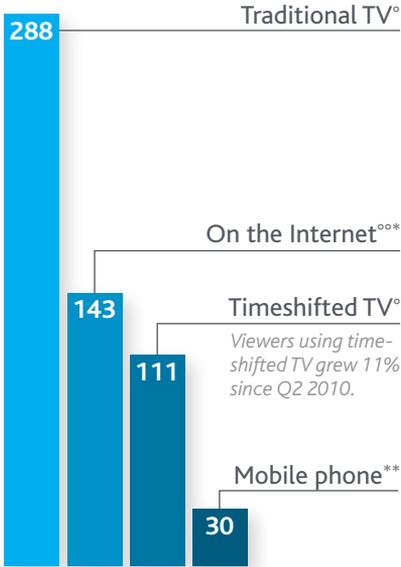
(millions of households)<sup>5</sup>

Total — 85.9 million



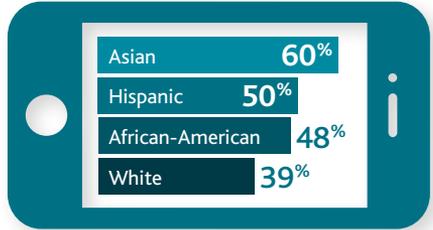
## HOW PEOPLE WATCH TV/VIDEO<sup>6</sup>

(millions of viewers, ages 2 and up)



## SMARTPHONE PENETRATION<sup>8</sup>

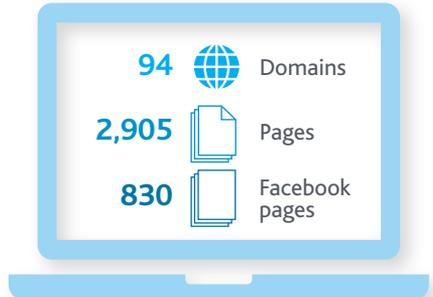
(by ethnicity)



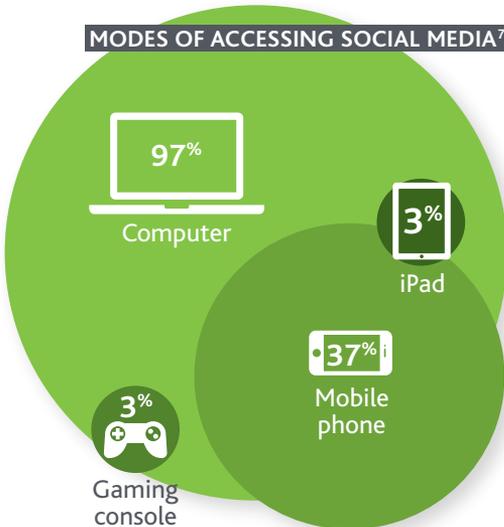
*Android is the preferred OS except among Asians, who typically opt for iPhones.<sup>3</sup>*

## ONLINE VISITS AND VIEWS

(per person per month)<sup>3</sup>

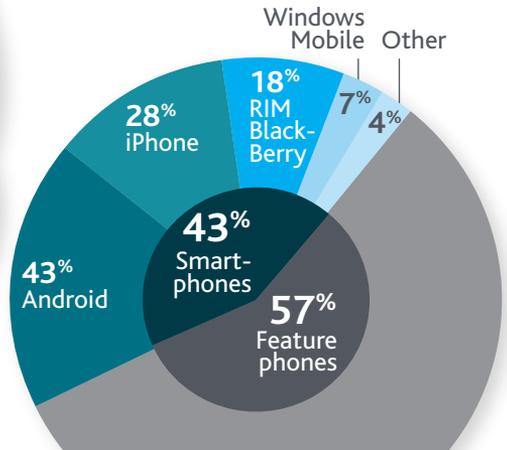


## MODES OF ACCESSING SOCIAL MEDIA<sup>7</sup>



*Nearly 4 in 5 active Internet users visit social networks and blogs.<sup>9</sup>*

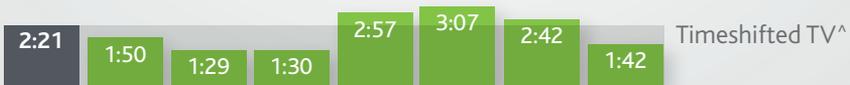
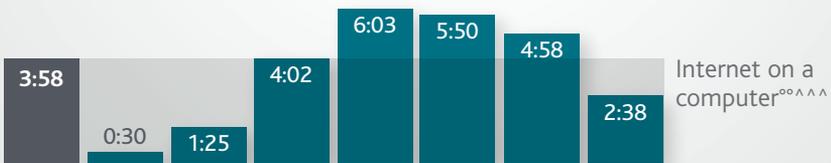
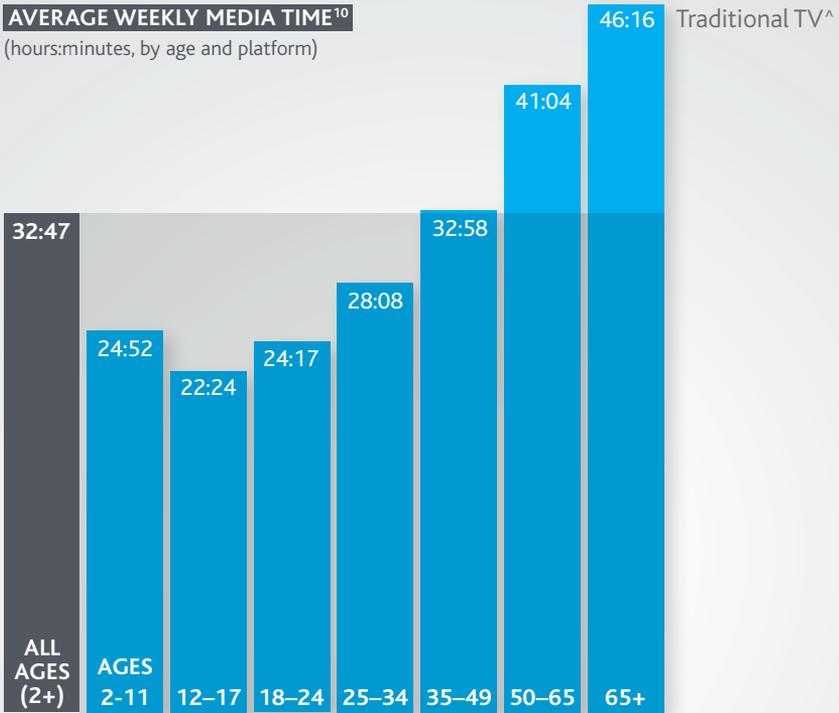
## SMARTPHONE OS MARKET SHARE<sup>8</sup>



# The American Video Viewer

## AVERAGE WEEKLY MEDIA TIME<sup>10</sup>

(hours:minutes, by age and platform)



## MOBILE VIDEO<sup>11</sup>

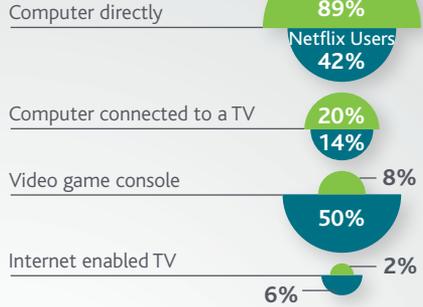
Top channels by unique viewers



## STREAMING SERVICES<sup>12</sup>

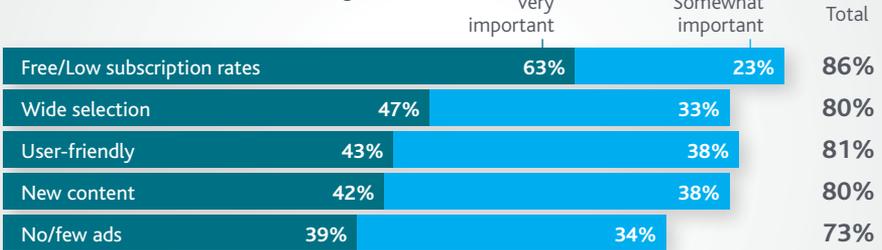
% of Netflix and Hulu viewers who watch using a(n)...

*Just 1.2 million people used a standalone streaming device, such as Apple TV or Boxee, but these devices account for nearly 1/5 of their TV screen time.<sup>13</sup>*



## MOBILE VIDEO APP ATTRIBUTES<sup>14</sup>

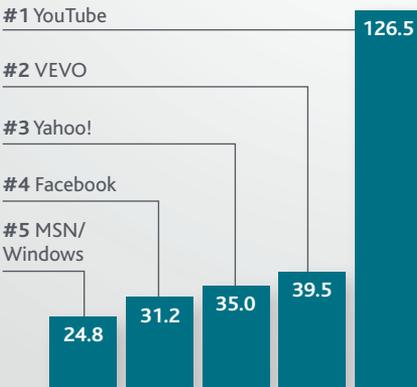
% of consumers who deem the following attributes as...



## TOP FIVE ONLINE VIDEO DESTINATIONS BY...<sup>15</sup>

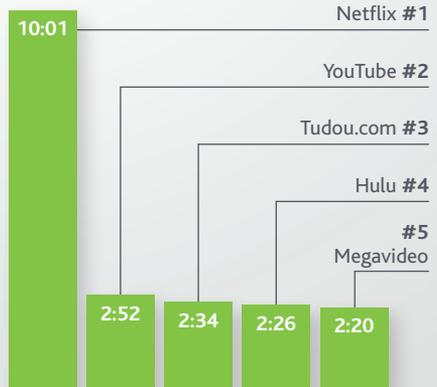
### UNIQUE VIEWERS

(in millions)



### TIME SPENT PER MONTH

(hours:minutes per person)

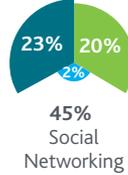
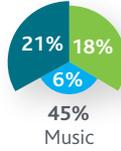
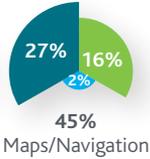
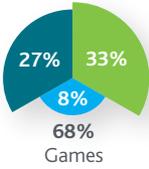


*Although unique viewers who are women watch more video on social networks and blogs, men spend 9% more time watching.<sup>16</sup>*

# The Seeking, Searching U.S. Consumer

## TOP APP CATEGORIES<sup>17</sup>

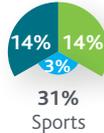
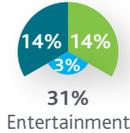
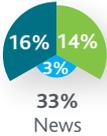
Percent of tablet and smartphone users who downloaded an app in the past 30 days.



PERCENTAGE WHO  
DOWNLOAD,  
BY CATEGORY...

...AND COST

- Free & paid apps
- Free apps only
- Paid apps only

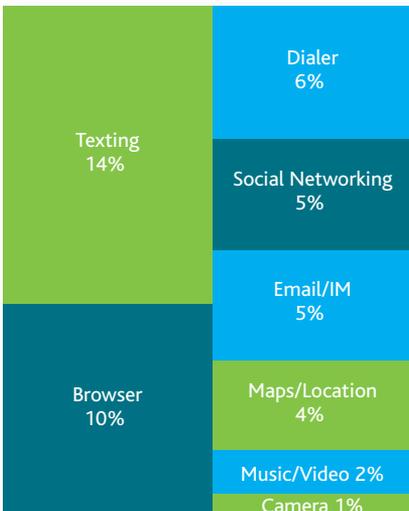


**51%** of consumers  
say that they are okay  
with advertising on  
their devices if it means  
they can access  
content for free.<sup>3</sup>



## MONTHLY BREAKDOWN OF TIME SPENT<sup>18</sup>

(on Android devices, September 2011 average)



All other Apps  
53%

Facebook and Twitter are more popular apps among women, while Google+ has a larger reach among men.



Retail apps such as Barcode Scanner (14% of Android users) and eBay Mobile (13%) are growing in reach.

On average, app downloaders have 33 apps on their phones.

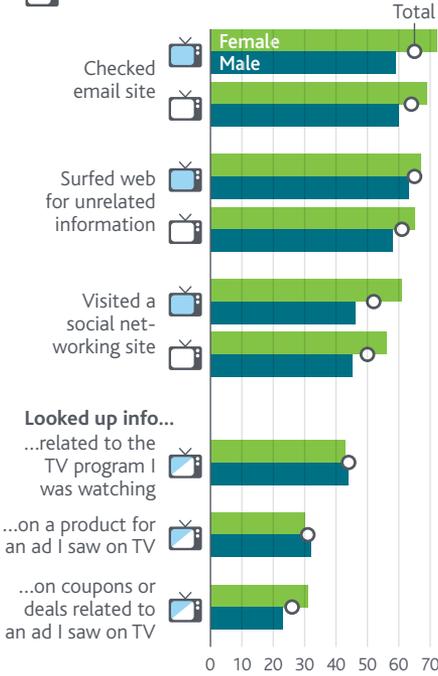
**33**

### SIMULTANEOUS USAGE<sup>17</sup>

Percent of consumers who did the following on their tablet while watching TV...

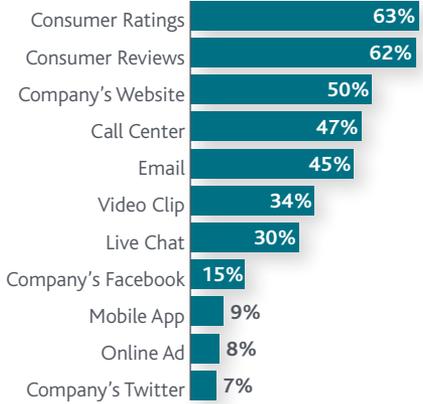
Programming

Commercials



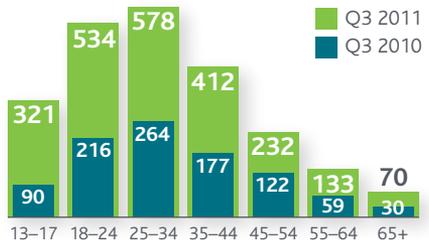
### TOP SOURCES OF INFORMATION<sup>19</sup>

Preferred sources for product and service information



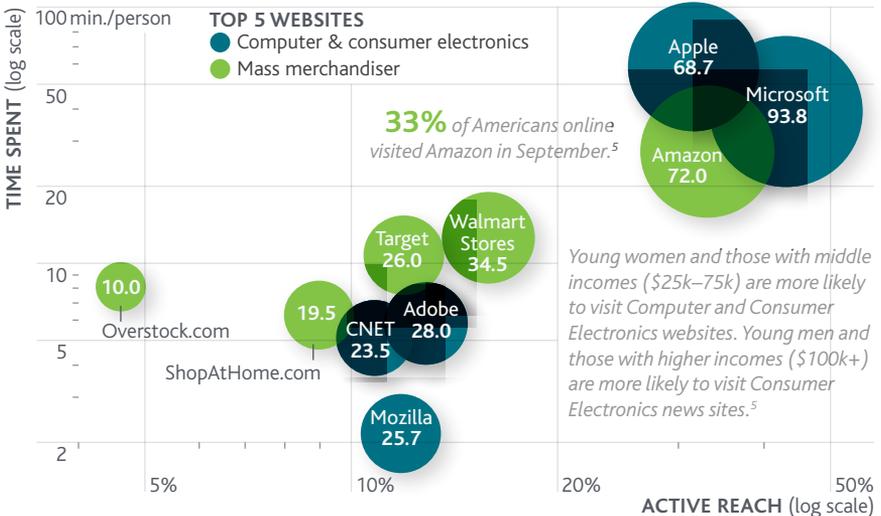
### MONTHLY DATA USAGE<sup>8</sup>

(by age, in MB)



### TOP RETAIL AND CONSUMER ELECTRONICS WEBSITES<sup>3</sup>

(by audience size in millions)

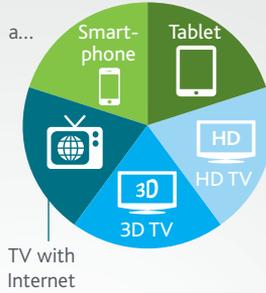


# The Globally Connected Consumer

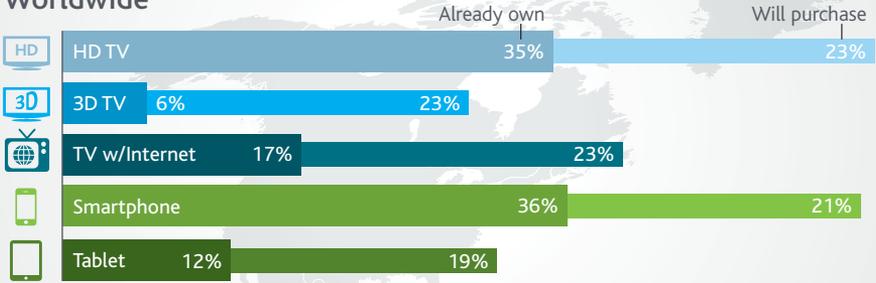
Nielsen's survey of more than 25,000 online respondents from 56 countries around the world reveals consumer's multi-screen purchase behavior/intentions.

## DEVICE PENETRATION<sup>20</sup>

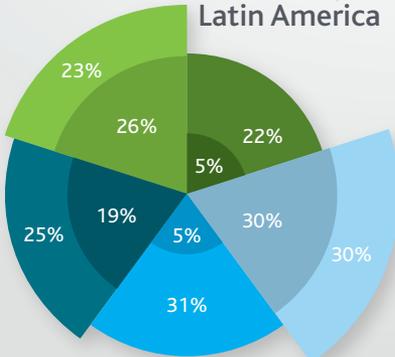
Percentage of online respondents who...



## Worldwide

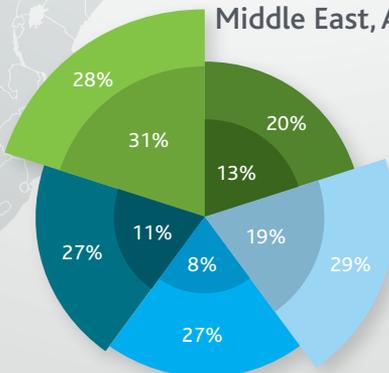
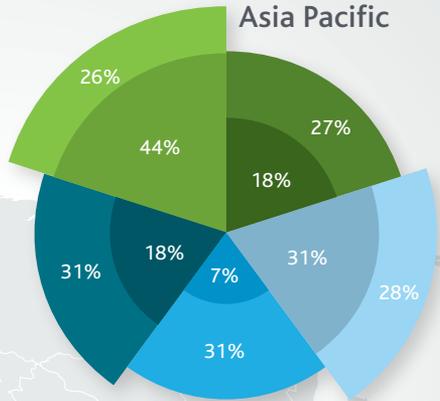
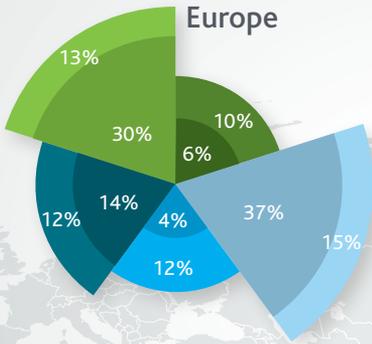
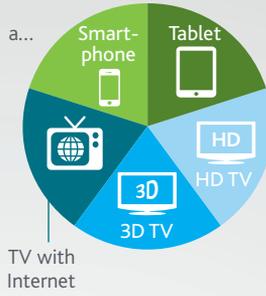


## Latin America



## DEVICE PENETRATION<sup>19,20</sup>

Percentage of online respondents who...



# Sources & Notes

1. Nielsen. National People Meter, Universe Estimates (November 2011)
2. Nielsen. Mobile Media Marketplace (Q3 2011)
3. Nielsen. NetView (September 2011)
4. Nielsen. Mobile Netview (September 2011)
5. Nielsen. Based on Universe Estimates for the 15th of each month, Home & Work (Q2 2011)
6. Nielsen. (Q2 2011)
7. NM Incite. State of Social Media Survey (April 2011)
8. Nielsen. U.S. Mobile Insights, National (Q3 2011)
9. Nielsen. (May 2011)
10. Nielsen. Data uniquely based on the Total Population in the US—all 297 million Americans over age 2—whether or not they have the technology (Q2 2011)
11. Nielsen. U.S. Mobile Video Survey (Q3 2011)
12. Nielsen. Netflix/Hulu survey (March 2011)
13. Nielsen. Custom Survey (November 2011)
14. CTAM/Nielsen. "Roadmap to Video Apps (What Makes Viewers APPy?)." (August 2011)
15. Nielsen. VideoCensus (September 2011)
16. Nielsen. VideoCensus, Home & Work (May 2011)
17. Nielsen. Applications Playbook (Q3 2011)
18. Nielsen. Smartphone Analytics, Device Metering Data (September 2011)
19. NM Incite (October 2011)
20. Nielsen, Global Omnibus Survey, (Q3 2011)

## NOTES

- ° Includes those viewing at least one minute (reach) within the measurement period. This includes Live viewing plus any playback within the measurement period.
- °° Internet figures are from home and work. Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video via their computers. All Internet figures are weekly or monthly averages over the course of the quarter.
- \* Due to a change in the format of Netflix stream URLs, streaming for the Netflix brand was not reported in the April and May VideoCensus reports. This was corrected with June-forward reporting.
- \*\* Video user projection, time spent and composition data 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).
- ^ 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.
- ^^ Nielsen's mobile survey reports mobile video usage for those users 13 and older. This 12-17 is T13-17 for all mobile data.
- ^^^ Due to a change in the type of call used behind Facebook's AJAX interface, Nielsen NetView data for Facebook page views and duration were underreported for June and July. This was corrected with August-forward reporting.

## ABOUT NIELSEN

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