



E-COMMERCE:

**EVOLUTION OR REVOLUTION IN THE
FAST-MOVING CONSUMER GOODS WORLD?**

AUGUST 2014

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™



E-COMMERCE SHIFTS INTO HIGHER GEAR



AROUND THE WORLD

Online purchase intention rates have doubled in three years for 12 of 22 measured categories

Online browsing is highest in Latin America; online buying is highest in Asia-Pacific

Consumable products have a one-to-one browse-to-buy ratio

Mobile phones are catching up in developing countries as the favored online shopping device

Nearly half use apps to save money; one in three use them to manage grocery lists

Millennials make up more than half of those who intend to buy online

E-commerce is big business and getting bigger every day. Growth estimates from eMarketer report that business-to-consumer (B2C) e-commerce sales worldwide will reach \$1.5 trillion in 2014, increasing nearly 20% over 2013. But not all e-commerce categories are created equal.

The most popular e-commerce categories, not surprisingly, are non-consumable—durables and entertainment-related products. Nielsen reports that almost half of global respondents in an online survey intend to purchase clothing or make airline or hotel reservations using an online device in the next six months. Other categories growing in prominence for online shopping include e-books, event tickets, sporting goods and toys (to name a few). Spending intentions for each have risen at a double-digit or near double-digit percentage-point rates since 2011.

The online market for buying groceries and other consumable products is comparatively smaller—but is starting to show promise. While durables are the starting point of adoption, consumables are attractive due to the frequency of purchase. Aside from online purchasing, digital is an increasingly important research and engagement platform.

Consumable categories are not likely reach the same level of online prominence as non-consumable categories due to the hands-on buying nature and perishability of the products, but the market is wide open and an eager audience is at the ready. This study provides clarity about global consumers' buying intentions for both consumable and non-consumable categories in the growing e-commerce landscape, which answers important questions for brand marketers and retailers on who is buying what and how they can achieve greater success.

"The lightning-fast pace of change in the digital landscape has ushered in a consumer mindset that is both adventurous and exploratory when it comes to online shopping," said John Burbank, President of Strategic Initiatives, Nielsen. "Consumers everywhere want a good product at a good price, and the seemingly limitless options available in a virtual environment provide new opportunities for both merchants and consumers. The market for fast-moving consumer goods is no exception."

To take the pulse of the online shopping and purchasing intentions of consumers worldwide, Nielsen surveyed 30,000 online consumers in 60 countries to reveal the most popular product categories for buying versus browsing and where purchase propensity is leading and lagging. Importantly, we take a close look at online strategies that resonate positively with consumers when considering a consumable purchase online, and we uncover a few barriers that may stand in the way of success.

ABOUT THE GLOBAL SURVEY METHODOLOGY

The findings in this survey are based on respondents with online access in 60 countries. While an online survey methodology allows for tremendous scale and global reach, it provides a perspective only on the habits of existing Internet users, not total populations. In developing markets where online penetration is still growing, audiences may be younger and more affluent than the general population of that country. In addition, survey responses are based on claimed behavior rather than actual metered data.

Where noted, the survey research is supplemented with observed behavior using Nielsen's retail, consumer purchase and digital panels.

ONLINE BUYING OR BROWSING?

Are consumers using the Internet to research products with the intention of making a purchase online, or are they taking their new-found knowledge back to brick-and-mortar retail locations to make the transaction? The answer largely depends on the product—and you may be surprised by some of the findings.

When it comes to shopping for clothes, event tickets, books and toys, or making reservations for tours and hotels, consumers typically have something specific in mind. For these transactions, there is mostly a one-to-one correlation between online searching and shopping—those who browse online also buy online. These closely linked browsing/buying items are also among those with the highest respondent purchase intention rates, which range between 35% and 46%.

Consumable products, on the other hand, have lower online browse/buy intention rates than non-consumable products, but surprisingly, they boast just as strong browse-to-buy correlations. For example, for cosmetics, 33% of global respondents say they browse and 31% say they buy: nearly a one-to-one correlation. Similarly, about one-third of global respondents say they browse and buy personal care products (31%/29%) and groceries (30%/27%). About one-fourth browse and buy pet products (24%/21%) and baby supplies (23%/20%), and roughly one-fifth browse/buy flowers (20%/18%) and alcoholic drinks (20%/17%).

“Strong online browse-to-buy correlation rates for fast-moving consumer goods translates to loyal repeat customers for these categories,” said Burbank. “While these categories are still in the early stages of online adoption, these correlations signal great news for retailers. Now is the time to create omni-channel experiences for consumers who are actively using both digital and physical platforms to research and purchase, as increasingly, they don’t make a distinction between the two.”

As noted, people are more likely to buy non-consumables online. But some have lower browse/buy ratios. Products more conducive to online browsing than buying include: electronic equipment, mobile phones, computer hardware/software, sporting goods and cars/motorcycles. These products can carry a high price tag and often require a physical try-before-you-buy test run. The browse-to-buy difference for these products averages about 7 percentage points.

Of 22 categories in the study, the only category with a higher global online buy-to-browse ratio is airline tickets (48% buy/40% browse). Securing air travel plans online has proven to be a reliable and effective method for many.



CONSUMABLE CATEGORIES HAVE STRONG ONLINE BROWSE-TO-BUY CORRELATION RATES

GLOBAL AVERAGE - ONLINE BROWSING AND BUYING INTENTIONS IN THE NEXT 6 MONTHS

● BROWSE PERCENTAGES ● BUY PERCENTAGES

CONSISTENT BROWSE/BUY RATES

CLOTHING, ACCESSORIES
AND SHOES



TOURS AND HOTEL
RESERVATIONS



EVENT TICKETS



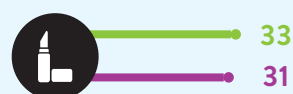
HARDCOPY BOOKS



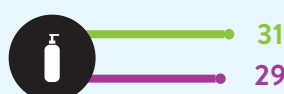
E-BOOKS



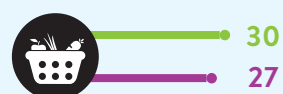
COSMETICS



PERSONAL CARE



GROCERIES



TOYS AND DOLLS



PET-RELATED
PRODUCTS



BABY SUPPLIES



FLOWERS



ALCOHOLIC DRINKS



Consumable categories

MORE BROWSING THAN BUYING

ELECTRONIC EQUIPMENT



MOBILE PHONE



COMPUTER HARDWARE



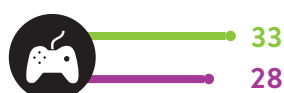
SPORTING GOODS



COMPUTER
SOFTWARE



VIDEOS, DVDS,
GAMES



MUSIC
(NOT DOWNLOADED)



CAR, MOTORCYCLE
AND ACCESSORIES



MORE BUYING THAN BROWSING

AIRLINE TICKETS AND
RESERVATIONS



Source: Nielsen Global Survey of E-commerce, Q1 2014

EMERGING MARKETS RACE TO EMBRACE E-COMMERCE

The appetite for online browsing is strongest in the largely developing regions of Latin America and Asia-Pacific, with both eclipsing the global average for all 22 categories in the study. But similarities between the two regions stop there.

The biggest difference? Latin Americans browse and Asia-Pacific respondents buy.

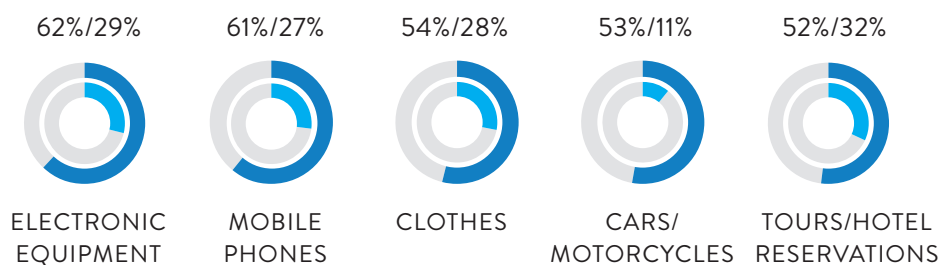
In fact, while online browsing rates are highest in Latin America, online buying rates for the region are the lowest for just about every category in the study. Conversely, online buying rates in Asia-Pacific are the highest of any region—so high that buying rates exceed browsing rates for more than half (14) of the categories.

MOST POPULAR BROWSING/BUYING CATEGORIES



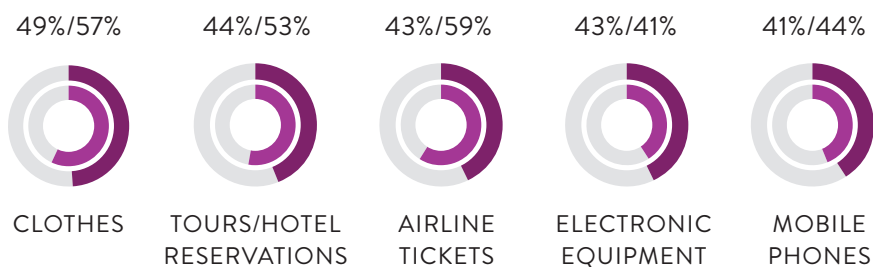
LATIN AMERICA

● BROWSING ● BUYING



ASIA-PACIFIC

● BROWSING ● BUYING



“Latin Americans are enthusiastic online shoppers, but the online retail infrastructure has not yet caught up with offering conversion opportunities,” said Burbank. “Other barriers to e-commerce success include Internet access, shipping costs, high taxes and problematic delivery logistics. Asia is the farthest down the e-commerce maturity curve. In Asia-Pacific, tech-savvy consumers have already embraced the convenience of online shopping. Attracting new buyers using mobile could be an accelerator in the developing markets, as it provides greater access to more people faster.”

Online browsing and buying percentages are similar in Europe, North America and the Middle East/Africa, with a few exceptions, but for different reasons than those which affect Latin America and Asia-Pacific. It comes down to availability and opportunity.

In North America and the largely-developed region of Europe, there is no shortage of product availability. Shopping options in these regions proliferate and online retailing represents another channel competing for market share.

“Western Europe is leading the way on consumer-packaged goods category adoption for e-commerce,” said Burbank. “In the U.K. and France, the traditional hypermarkets and grocery retailers have gone ‘all in’ and are driving real change with consumers on their buying habits.” Online trips for fast-moving consumer goods in Great Britain have increased from 70 million in the year ending Q1 2013 to 91 million in the year ending Q1 2014, and in France, trips have increased from 32 million to 42 million in that time period.

In the Middle East/Africa region, lower-than-average online percentages can largely be attributed to opportunity—or lack thereof. In a region where disposable income is low and shopping for daily needs is the norm, online shopping is not a priority. But that will change as more consumers continue to move up the socio-economic ladder.

**LATIN AMERICA HAS HIGHEST ONLINE BROWSE RATES:
ASIA-PACIFIC HAS HIGHEST ONLINE BUY RATES**

ONLINE BROWSING AND BUYING INTENTIONS IN THE NEXT 6 MONTHS



BROWSERS

	ASIA-PACIFIC	EUROPE	MIDDLE EAST/AFRICA	LATIN AMERICA	NORTH AMERICA
CLOTHING, ACCESSORIES AND SHOES	49%	37%	32%	54%	50%
ELECTRONIC EQUIPMENT	43%	36%	37%	62%	42%
TOURS AND HOTEL RESERVATIONS	44%	33%	34%	52%	44%
AIRLINE TICKETS AND RESERVATIONS	43%	31%	35%	49%	44%
MOBILE PHONE	41%	33%	40%	61%	33%
EVENT TICKETS	39%	31%	31%	48%	38%
COMPUTER HARDWARE	39%	32%	35%	51%	37%
HARDCOPY BOOKS	40%	29%	30%	48%	34%
COMPUTER SOFTWARE	36%	26%	35%	50%	34%
E-BOOKS	39%	23%	35%	45%	33%
SPORTING GOODS	39%	25%	27%	47%	29%
MUSIC (NOT DOWNLOADED)	36%	25%	30%	47%	30%
VIDEOS, DVDs AND GAMES	35%	25%	30%	47%	34%
COSMETICS	39%	24%	26%	42%	24%
PERSONAL CARE	38%	20%	26%	40%	19%
GROCERIES	37%	19%	22%	37%	19%
TOYS AND DOLLS	33%	18%	24%	35%	25%
CAR, MOTORCYCLE AND ACCESSORIES	26%	24%	27%	53%	25%
PET-RELATED PRODUCTS	25%	17%	20%	36%	23%
BABY SUPPLIES	28%	13%	23%	32%	13%
FLOWERS	22%	11%	20%	26%	23%
ALCOHOLIC DRINKS	26%	10%	12%	27%	10%



BUYERS

	ASIA-PACIFIC	EUROPE	MIDDLE EAST/AFRICA	LATIN AMERICA	NORTH AMERICA
CLOTHING, ACCESSORIES AND SHOES	57%	34%	26%	28%	42%
ELECTRONIC EQUIPMENT	41%	25%	26%	29%	30%
TOURS AND HOTEL RESERVATIONS	53%	33%	35%	32%	43%
AIRLINE TICKETS AND RESERVATIONS	59%	34%	39%	36%	43%
MOBILE PHONE	44%	22%	28%	27%	22%
EVENT TICKETS	50%	33%	28%	31%	35%
COMPUTER HARDWARE	36%	23%	25%	20%	29%
HARDCOPY BOOKS	50%	30%	22%	24%	31%
COMPUTER SOFTWARE	33%	19%	27%	18%	27%
E-BOOKS	43%	22%	29%	23%	35%
SPORTING GOODS	42%	19%	20%	19%	21%
MUSIC (NOT DOWNLOADED)	33%	19%	21%	19%	30%
VIDEOS, DVDs AND GAMES	32%	21%	23%	21%	33%
COSMETICS	43%	21%	19%	20%	21%
PERSONAL CARE	43%	17%	18%	14%	16%
GROCERIES	41%	14%	15%	11%	14%
TOYS AND DOLLS	40%	16%	18%	17%	24%
CAR, MOTORCYCLE AND ACCESSORIES	20%	13%	16%	11%	15%
PET-RELATED PRODUCTS	26%	15%	14%	11%	19%
BABY SUPPLIES	29%	12%	16%	11%	12%
FLOWERS	21%	11%	16%	10%	21%
ALCOHOLIC DRINKS	25%	9%	11%	8%	10%

Source: Nielsen Global Survey of E-commerce, Q1 2014

CATEGORIES WITH ROOM TO GROW

E-commerce has come a long way in a short time. Online purchase intention rates have doubled in three short years for more than half of the categories measured between 2011 and 2014. And these high-growth categories still have plenty of room to grow digitally.

Global online purchase intention rates in 2014 have doubled since 2011 for event tickets (41%), electronic books (34%), sporting goods (31%), toys/dolls (29%), videos/DVDs/games (28%), music (27%), pet supplies (21%)*, flowers (18%), cars/accessories (17%) and alcoholic drinks (17%). And rates have tripled in these three years for computer software (27%) and nearly tripled for baby supplies (20%).

The baby supply category is really taking off in China, Korea, France, the U.S. and the U.K. to name a few countries. For example, of the top 10 most popular categories sold online in China (based on Nielsen e-commerce sales figures), sales of baby supplies already comprise three categories. In Korea, baby supplies make up two of the top 10 categories and in France, five. Diapers and infant formula make up the largest portion of online sales compared to online and offline sales: In China (29% diapers/23% infant formula); in Korea (10% diapers/22% infant formula [hypermarket online sales only]) and in France (5% diapers/5% infant formula). Young moms should be an obvious e-commerce focus for marketers for these products.

“While durable and entertainment-based categories are showing a substantial rise in intent, consumable categories like pet supplies and baby supplies are also gaining traction quickly,” said Burbank. “While online transactions make it easy to download a book, buy a ticket to a sporting event or book a hotel room, building a consumer base for consumable categories requires more marketing muscle. Finding the right balance between meeting shopper needs for assortment and value, while also building trust and overcoming negative perceptions, such as high costs and shipment fees, is vital for continued and sustainable growth.”

Other consumable categories, such as cosmetics and groceries, are also growing. Global online purchase intentions for the cosmetic category increased 6 percentage points in three years, from 25% in 2011 to 31% in 2014, and groceries rose 5 percentage points, from 22% in 2011 to 27% in 2014. China and South Korea are leaders in both categories, with purchase intentions exceeding the global average by about 20 percentage points each.

*Purchase intention for pet supplies doubled since 2012.

ONLINE PURCHASE INTENTION GROWTH RATES 2011 - 2014

GLOBAL AVERAGE ONLINE PURCHASE INTENTIONS IN THE NEXT 6 MONTHS

		2011	2014	PERCENTAGE POINT GROWTH
	EVENT TICKETS	22%	41%	19%
	E-BOOKS	15%	34%	19%
	COMPUTER SOFTWARE	9%	27%	18%
	TOURS AND HOTEL RESERVATIONS	27%	44%	17%
	SPORTING GOODS	15%	31%	16%
	TOYS AND DOLLS	13%	29%	16%
	AIRLINE TICKETS AND RESERVATIONS	33%	48%	15%
	VIDEOS, DVDS AND GAMES	15%	28%	13%
	MUSIC (NOT DOWNLOADED)	14%	27%	13%
	COMPUTER HARDWARE	18%	30%	12%
	BABY SUPPLIES	8%	20%	12%
	FLOWERS	7%	18%	11%
	CAR, MOTORCYCLE AND ACCESSORIES*	8%	17%	9%
	ALCOHOLIC DRINKS	8%	17%	9%
	ELECTRONIC EQUIPMENT	27%	34%	7%
	COSMETICS*	25%	31%	6%
	HARDCOPY BOOKS	34%	39%	5%
	GROCERIES	22%	27%	5%
	CLOTHING, ACCESSORIES AND SHOES	42%	46%	4%
		2012	2014	PERCENTAGE POINT GROWTH
	PET-RELATED PRODUCTS	9%	21%	12%
	MOBILE PHONE	26%	33%	7%

* Car, motorcycle and accessories was categorized as "automobiles and parts" in 2011
Cosmetics was categorized as "cosmetics/nutrition supplies" in 2011

Source: Nielsen Global Survey of E-commerce, Q1 2014, Q3 2011 and Q1 2012

AGE MATTERS WITH DIGITAL SHOPPERS

Millennials (age 21-34) are a coveted demographic for marketers in just about any industry, and e-commerce is no exception. This age segment has grown up in the digital era, so this comes as no surprise. But while Millennials comprise more than half of respondents (53%) who plan to make an online purchase across every product category in the study, older generations represent a sizeable 40% share, too.

Reaching older age segments, however, is much more fragmented territory than with their younger counterparts. As expected, the older the age, the greater their decline in online shopping.

Globally, Generation X (age 35-49) respondents comprise about 28% of those willing to make a purchase online and Baby Boomers (age 50-64) make up about 10%. The Silent Generation (age 65+) contributes roughly 2%. The youngest age group, Generation Z (under age 20), represents about 7% of those who intend to purchase online.

Interestingly, the mix of age groups is consistent when you look at the purchase behavior for every category in the study. While overall purchase intention rates are higher and lower in one category or another, the generational mix is roughly the same regardless of the category. This suggests that once an online shopper, always an online shopper. For example, Millennials make up a higher-than-average percentage of respondents willing to buy groceries online (56%), but Generation X still comprises 26% and Baby Boomers make up 9%, which is not far from the global averages for these age segments across all categories.

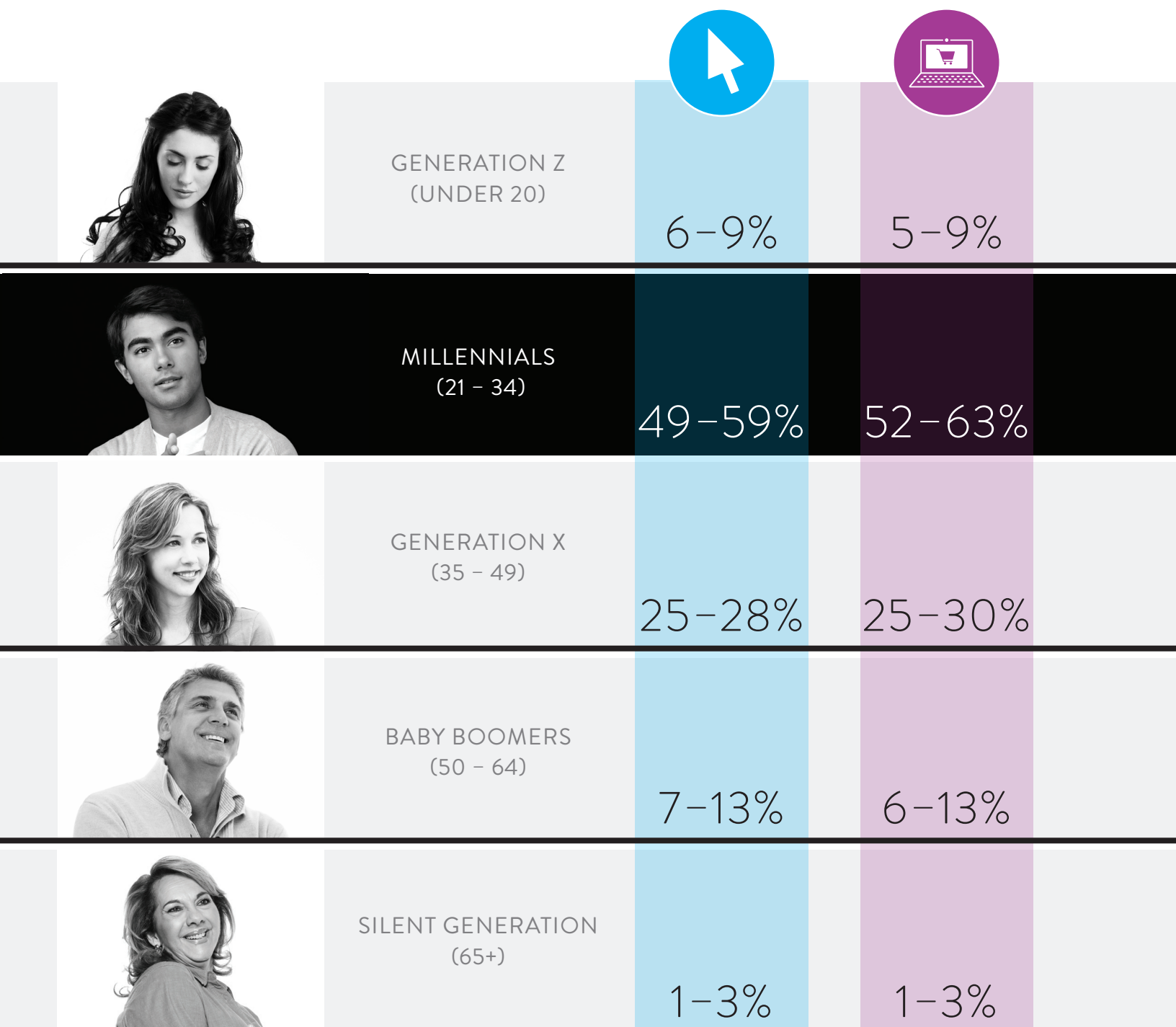
“While the generational mix of online shoppers currently skew younger, attention to the needs of all segments should be considered when developing outreach plans,” said Burbank. “Tomorrow’s highest purchase-power consumers are ones who skew much higher for digital shopping. As the population ages, greater percentages of consumers will be connected and online prominence will continue to grow. Building trust at the onset is the foundation for sustaining lifetime loyalty among shoppers.”

MILLENNIALS MAKE UP THE MAJORITY OF ONLINE PURCHASE INTENDERS

GLOBAL AVERAGE
PERCENT OF THE POPULATION RANGES THAT MAKE UP
ONLINE PURCHASE INTENDERS FOR 22 CATEGORIES

WILL BROWSE ONLINE

WILL BUY ONLINE



Source: Nielsen Global Survey of E-commerce, Q1 2014

DEVICE DIFFERENTIAL

With a plethora of Internet-connected devices to choose from, there is no shortage of ways for consumers to browse and buy online. And the device of choice is decidedly different around the world.

Computers are the favored device for online browsing and buying among respondents in all regions, but mobile phones are a close second pick for respondents in the Middle East/Africa region and growing in prominence in Asia-Pacific and Latin America. In developing markets, mobile is often the first-access device to the Internet. Tablets—which have been available for just four years, beginning with the 2010 introduction of Apple's iPad—are used by nearly one-third (31%) of global respondents for online shopping.

North America (84%), Latin America (82%) and Asia-Pacific (81%) boast the largest percentages of respondents using a computer to shop online, exceeding the global average of 80%. European respondents come up just below the global figure at 78%. Survey respondents in the Middle East/Africa reported the lowest computer usage at 60%.

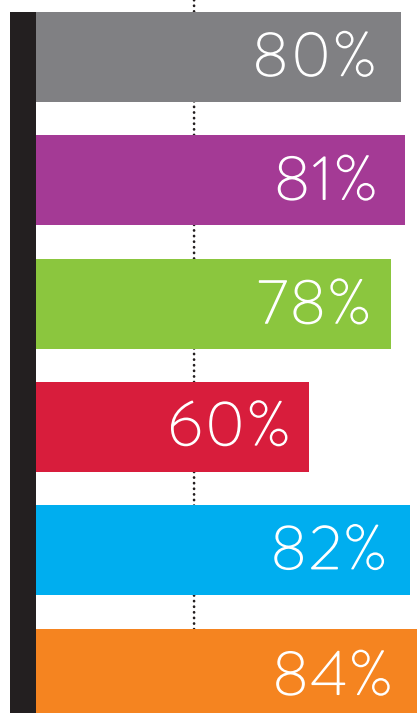
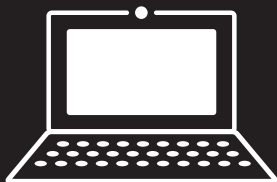
Mobile phone usage is strongest in the Middle East/Africa, with 55% of respondents using the device for online shopping—11 percentage points higher than the global average of 44%. Similarly, mobile phone usage is popular in Asia-Pacific (52%) and Latin America (48%). One-third of European respondents (33%) and more than one-fourth (27%) of North Americans use their mobile phones to shop.

While tablets are currently less popular than other devices for shopping online, their portability and large-screen features are conducive to online shopping. As penetration of these devices continues to grow, so too will online shopping usage. Tablet usage in the Middle East/Africa (38%) and Asia-Pacific (35%) eclipse the global average, followed by Latin America (29%), North America (26%) and Europe (24%). Countries where tablet usage is strongest include Egypt (46%), Saudi Arabia and Finland (44%), India (41%), Indonesia and United Arab Emirates (39%).

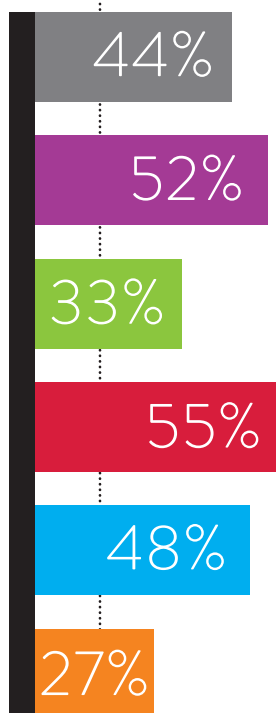
DEVICES USED MOST FREQUENTLY FOR ONLINE SHOPPING

AMONG THOSE WHO WILL SHOP OR MAKE A PURCHASE ONLINE IN THE NEXT 6 MONTHS

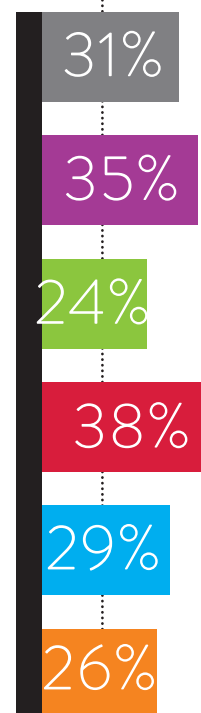
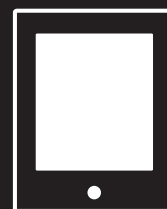
COMPUTER



MOBILE DEVICE



TABLET



● GLOBAL AVERAGE ● ASIA-PACIFIC ● EUROPE
● MIDDLE EAST/AFRICA ● LATIN AMERICA ● NORTH AMERICA

Source: Nielsen Global Survey of E-commerce, Q1 2014



THE TIPPING POINT FOR ONLINE CONSUMABLES

Little things can make a big difference. When it comes to growing an online shopper base for consumable categories, knowing what drives behavior is vital to increased engagement. And, of course, not all shoppers want the same things.

While some shoppers treasure convenience and are less risk averse, others need research and reassurance before making a purchase. Still others are bargain hunters, always on the hunt for a good deal. And then there are the skeptics. For these cynical shoppers, overcoming negative online perceptions can be the difference between a doubter and a devotee.

Regardless of shopper classification, when it comes to shopping online for consumable products, the experience must be convenient, cost-effective and safe. Companies that address these critical components will be best-positioned for online success.

SHOPAHOLICS

Online shopping for these global respondents is convenient (76%) and fun (64%). They like getting email notifications from retailers (46%), and they manage their grocery lists using a mobile app or via an online tool (35%). As these shoppers represent active online participants, marketers should leverage a full suite of online strategies to keep them engaged. Offering tools that remember past purchases, and providing flexible return policies and pick-up options will help keep these shoppers coming back for more.

RESEARCHERS

Knowledge is king for these global online shoppers who like to read online reviews prior to purchasing a product (71%). They spend a considerable amount of time researching products before buying (61%). Social media is a helpful tool in reaching these consumers who often connect with friends, family and strangers to help make purchase decisions (43%). To satisfy their need for knowledge, offer detailed product descriptions and product images. Posting review forums and product reviews will help to build trust.

SAVERS

Savvy savers are always on the hunt to find the lowest prices. These global shoppers believe they get the best prices online (60%), and they find deals that are better than those offered in the store (54%). They subscribe to product and store emails to stay informed and to save money (54%), and they use price-saving apps or websites when planning a shopping trip (47%) and when in the store (42%). When reaching these consumers, consider pricing and promotion strategies that are competitive with or better than in-store offerings. Offer online coupons and free shipping delivery options to help keep costs low for these shoppers.

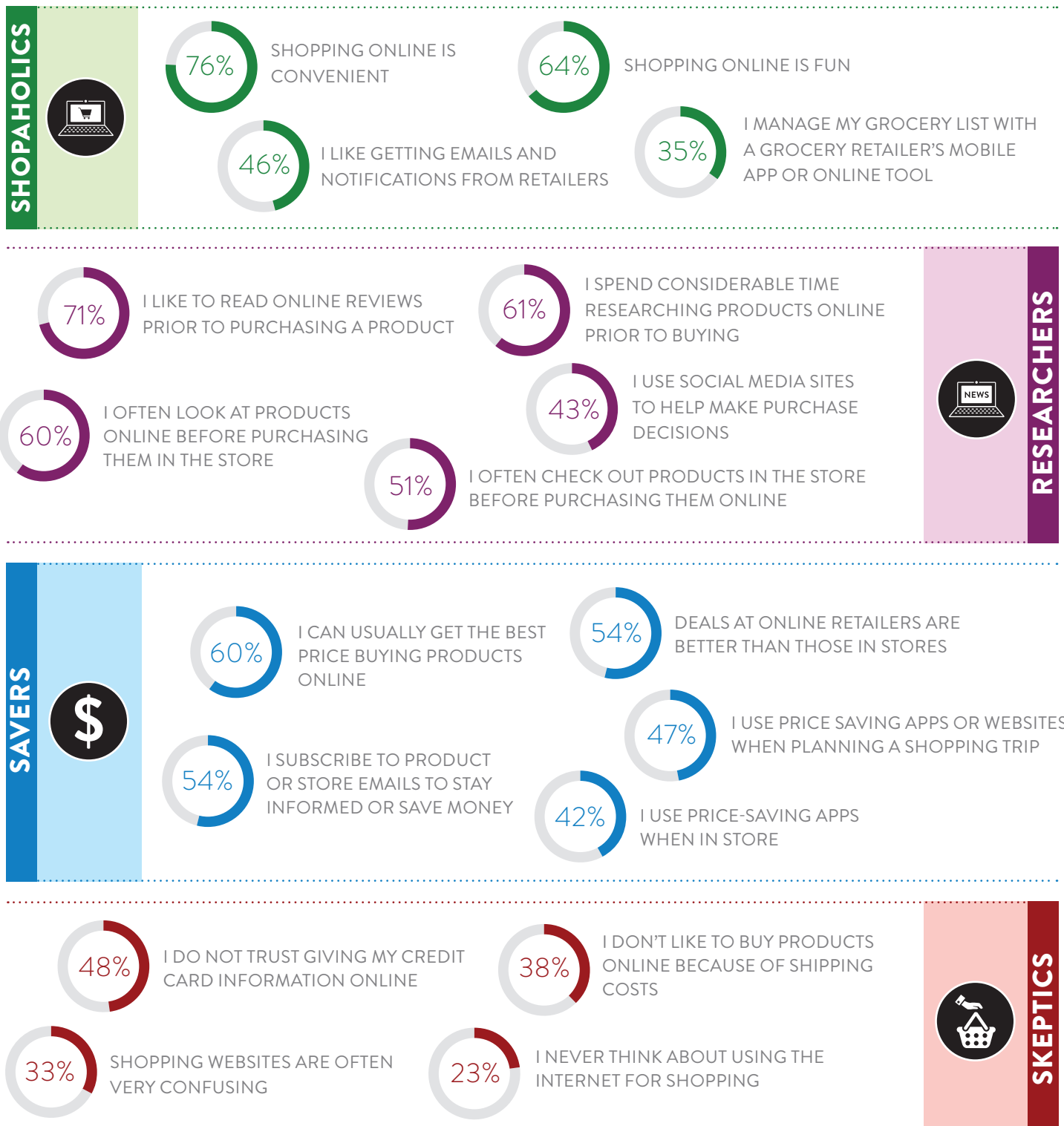
SKEPTICS

Privacy and security are worries for these global respondents who are wary of giving their credit card information online (48%). To help alleviate concerns, assure shoppers that their information will be kept confidential by including security notifications at checkout. Shipping costs (38%) and confusing websites (33%) are other barriers for these skeptical shoppers. Free shipping is important here, too, as is clarity of presentation.

To increase digital engagement, then, retailers must deliver on multiple shopper needs for lower prices, quality choices and peace of mind. Easy-to-navigate websites that offer a wide selection of well-described, unique products with plenty of images and have proper security protocols are a must.

GLOBAL SHOPPER ATTITUDES FOR BUYING CONSUMABLE PRODUCTS ONLINE

PERCENT OF GLOBAL RESPONDENTS WHO AGREE WITH THE FOLLOWING STATEMENTS



Source: Nielsen Global Survey of E-commerce, Q1 2014

COUNTRIES INCLUDED IN THIS STUDY

EUROPE

MARKET	INTERNET PENETRATION
Austria	80%
Belgium	81%
Bulgaria	51%
Croatia	71%
Czech Republic	73%
Denmark	90%
Estonia	78%
Finland	89%
France	80%
Germany	83%
Greece	53%
Hungary	65%
Ireland	77%
Israel	70%
Italy	58%
Latvia	72%
Lithuania	65%
Netherlands	93%
Norway	97%
Poland	65%
Portugal	55%
Romania	44%
Russia	48%
Serbia	56%
Slovakia	79%
Slovenia	72%
Spain	67%
Sweden	93%
Switzerland	82%
Turkey	46%
United Kingdom	84%
Ukraine	34%

ASIA-PACIFIC

MARKET	INTERNET PENETRATION
Australia	89%
China	40%
Hong Kong	75%
India	11%
Indonesia	22%
Japan	80%
Malaysia	61%
New Zealand	88%
Philippines	32%
Singapore	75%
South Korea	83%
Taiwan	75%
Thailand	30%
Vietnam	34%

LATIN AMERICA

MARKET	INTERNET PENETRATION
Argentina	66%
Brazil	46%
Chile	59%
Colombia	60%
Mexico	37%
Peru	37%
Venezuela	41%

MIDDLE EAST / AFRICA

MARKET	INTERNET PENETRATION
Egypt	36%
Pakistan	15%
Saudi Arabia	49%
South Africa	17%
United Arab Emirates	71%

NORTH AMERICA

MARKET	INTERNET PENETRATION
Canada	83%
United States	78%

Source: Internet World Stats, June 30, 2012

ABOUT THE NIELSEN GLOBAL SURVEY

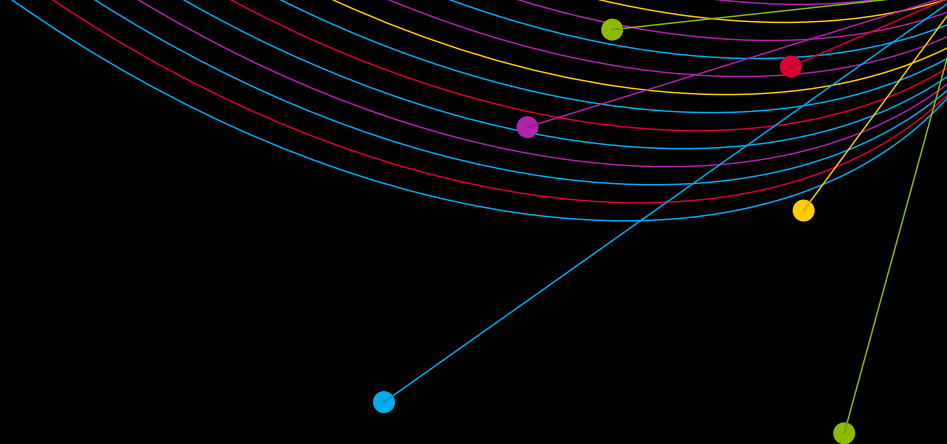
The Nielsen Global Survey of E-commerce was conducted between Feb. 17 and March 7, 2014, and polled more than 30,000 consumers in 60 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on its Internet users and is weighted to be representative of Internet consumers. It has a margin of error of ± 0.6 percent. This Nielsen survey is based only on the behavior of respondents with online access. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or an online population of 10 million for survey inclusion. The Nielsen Global Survey, which includes the Global Consumer Confidence Index, was established in 2005.

ABOUT NIELSEN

Nielsen 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 and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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