U.S.

DIGITAL FUTURE IN FOCUS 2012

Key Insights from 2011 and What They Mean for the Coming Year

comScore

February 2012

Introduction

Sparked by a wave of innovation in digital device hardware and technology software platforms, accompanied by consumers' rapidly increasing digital consumption habits, 2011 marked an exciting year for the digital media industry and signaled an even more momentous year ahead. Amidst this constantly evolving landscape, successful digital strategies require insights into not only the current environment, but also into what trends will shape the future for digital consumers.

This report examines how the prevailing trends in social media, search, online video, digital advertising, mobile and e-commerce define the current United States marketplace and what these trends mean for the year ahead, as comScore helps bring the digital future into focus.

FOR FURTHER INFORMATION, PLEASE CONTACT:

Sarah Radwanick
comScore, Inc.
+1 206 268 6310
press@comscore.com

Andrew Lipsman
comScore, Inc.
+1 312 775 6510
press@comscore.com

comScore

Contents

comScore

Executive Summary

FACEBOOK-LED SOCIAL MEDIA MARKET IS REDEFINING COMMUNICATION IN THE DIGITAL AND PHYSICAL WORLDS

Social networking continues to amass online users and capture an increasing share of their time, redefining how people interact with their personal social circles and brands in both the online and offline environments. Social Networking accounted for 16.6 percent of all online minutes at the end of 2011 and is on track to surpass Portals as the most engaging online activity in 2012. Facebook continues to lead as the driving force behind this shift in consumer behavior accounting for the largest share of online minutes across the entire web in 2011.

BING GAINS GROUND IN SEARCH

Although Google maintains a strong lead in the U.S. search market, the most notable story in search this year was Bing's positive growth trajectory. Bing closed out the year by surpassing Yahoo! for the #2 position among core search engines for the first time in its history, bolstered in part by its social search partnership with Facebook implemented in early 2011. While Google still owns two-thirds of the search market, Bing has captured 15 percent of the market on its own and is powering about that same percentage on behalf of Yahoo!.

ONLINE VIDEO BOOM SIGNALS SEA CHANGE IN VIDEO ECOSYSTEM

Online video viewing witnessed impressive gains across a variety of measures in 2011, signaling a behavioral shift in how Americans are consuming video content. The increasing availability and adoption of long-form video content has driven a dramatic increase in video viewing as consumers exercise their freedom to watch available content however, whenever and wherever they want. More than 100 million Americans watched online video content on an average day to close out 2011, representing a 43-percent increase versus year ago. In addition to more daily viewers, the number of video streams jumped 44 percent to 43.5 billion in December 2011.

DIGITAL ADVERTISING ENTERS ERA OF INCREASED ACCOUNTABILITY AS BRAND DOLLARS CONTINUE TO SHIFT ONLINE

A staggering 4.8 trillion display ad impressions were delivered across the U.S. web in 2011 as brand advertisers continued to shift dollars to the digital medium. This shift in ad dollars has magnified the need for greater transparency and accountability in ad delivery across the digital advertising ecosystem, heralding in an era where digital campaign validation becomes a necessity to push digital ad dollars to the next level.

EXECUTIVE SUMMARY

SMARTPHONE AND TABLETS FUEL THE RISE OF THE DIGITAL OMNIVORE

The rise of smartphones and tablets has drastically altered consumers' digital media consumption – changing the way people access content, where they consume it and the frequency of consumption. This evolution of digital device interaction has given rise to an age of 'digital omnivores' – consumers who access content through several touch points during the course of their daily digital lives. In 2011, the majority of all mobile phone owners consumed mobile media on their device, marking an important milestone in the evolution of mobile from primarily a communication device to a content consumption tool. At the end of 2011, more than 8 percent of all digital traffic was consumed beyond the 'classic web' across devices such as smartphones and tablets.

E-COMMERCE IS BACK AND BIGGER THAN EVER

Despite the backdrop of continued economic uncertainty, 2011 was a strong year for retail e-commerce. Throughout the year, growth rates versus the prior year remained in double-digits to significantly outpace growth at brick-and-mortar retail. Consumers remained cautious spenders overall, but increasingly turned to digital commerce due to two prevailing factors: price and convenience. Total U.S. retail and travel-related e-commerce reached $256 billion in 2011, up 12 percent from 2010.

comScore.

Top Web Destinations

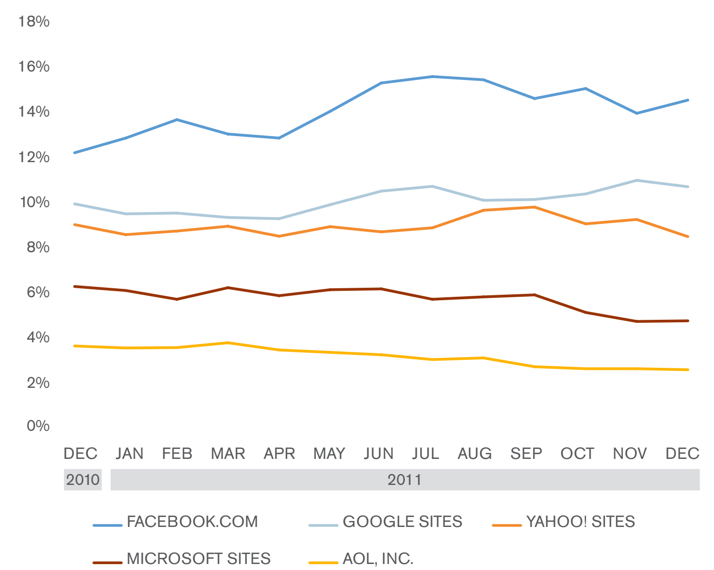
Traditional portals are conceding ground to Facebook and other social networks

GOOGLE OWNS LARGEST AUDIENCE, BUT FACEBOOK LEADS IN ENGAGEMENT

Though Google Sites remained the most visited U.S. web property in the U.S. with 187 million visitors in December 2011, Facebook continues to extend its lead as the most engaging web property, accounting for 14.6 percent of all time spent online to conclude the year. Google Sites, which is bolstered by its inclusion of YouTube, ranked second in terms of time spent at 10.8 percent, while Yahoo! Sites commanded the third position at 8.6 percent. The shifts in engagement among the top content properties suggest user trends moving away from traditional portal content in favor of social networking and entertainment content.

Share of Total Time Spent on Internet at Top Web Properties

Source: comScore Media Metrix, Dec-2010 to Dec-2011, U.S.



comScore

TOP WEB DESTINATIONS

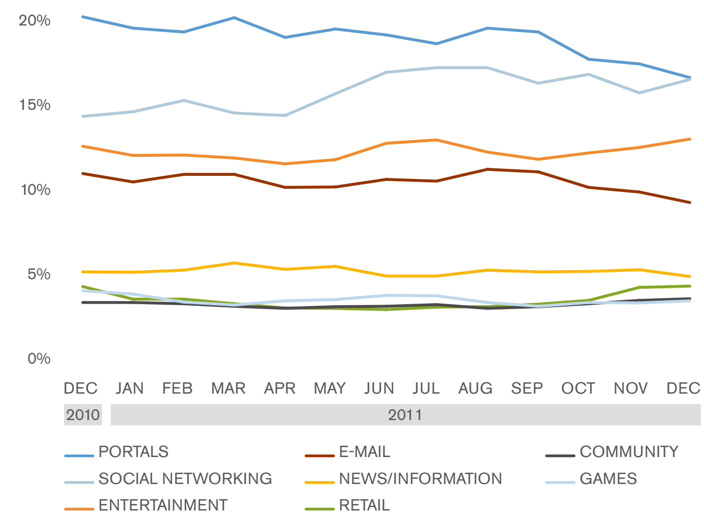
SOCIAL NETWORKING ON THE HEELS OF PORTALS FOR ENGAGEMENT LEAD

Despite the overall maturity of the U.S. web market, online consumer behavior patterns continue to evolve and shift over time. The web has slowly transformed from a primarily information-seeking, functional medium to one that is more oriented toward entertainment and leisure content. One of the key shifts in audience behavior has been declining engagement with portals and the rising engagement with social networks. Traditional Portals, such as Yahoo!, MSN and AOL, are conceding ground to Facebook and other social networks, which have increasingly become the starting point for many Americans online, while the key drivers of traditional Portal engagement including email, instant messengers and homepages continue to see engagement declines. As of December, Portals represented 16.7 percent of time spent online while Social Networking was just a fraction of a percentage point behind at 16.6 percent. If current trends continue, Social Networking will soon declare its supremacy over Portals. The Entertainment category, which includes TV and music content, video sites and entertainment news, is also gaining market share and currently accounts for 13 percent of time spent. Meanwhile, web-based email's market share slipped below 10 percent for the first time.

Among the categories experiencing the greatest overall declines in time spent online are Instant Messengers (down 40 percent), Online Personals (down 26 percent), Weather (down 23 percent) and Job Search (down 21 percent). Instant Messengers and Online Personals continue to lose traction as consumers shift to alternate communication channels, including social media and mobile. Weather, in

Share of Total Time Spent on Internet at Top Web Properties

Source: comScore Media Metrix, Dec-2010 to Dec-2011, U.S.



particular, is in the midst of a channel shift as consumers increasingly rely on their mobile devices to get weather information. Job Search sites, meanwhile, are coming down from the peaks that occurred during 2009 and 2010 when U.S. unemployment was well above 9 percent. Job Search is also another category that is witnessing opposite trends in the classic web and mobile channels with Job Listings leading as one of the top-gaining mobile content categories for 2011 with a 74-percent gain in mobile audience. As smartphone adoption continues to climb, 2012 will see mobile further influence digital content consumption as these devices change how, where and even why consumers go online.

comScore

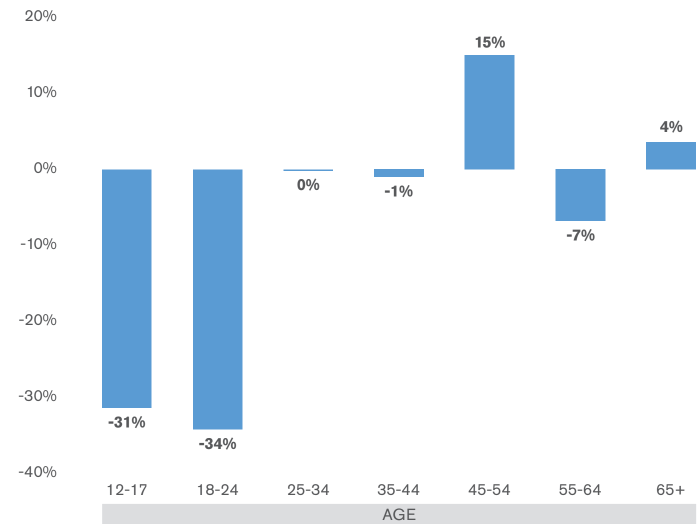
TOP WEB DESTINATIONS

CONTINUED DECLINES IN WEB-BASED EMAIL USAGE SIGNAL SHIFT IN CLASSIC WEB CONSUMPTION

One of the more significant trends in online communications is usage attrition in web-based email services as consumers shift to social media and alternate communication channels. The most notable declines in webmail engagement have been occurring among teens age 12-17 (down 31 percent) and 18-24 year olds (down 34 percent.). While the significant decline among teens represents a continuation of a similar trend observed last year, that 18-24 year olds are now moving away from webmail suggests a larger and more permanent shift in email usage may be occurring. Part of this shift is attributable to the rising role of mobile devices in consumers' digital lives, which is directly impacting how people engage with the classic web. The mobile email audience for both age segments saw double-digit growth in the past year, with mobile email users age 18-24 climbing 32 percent.

Percent Change in Time Spent Using Web-Based Email

Source: comScore Media Metrix, Dec-2011 vs. Dec-2010, U.S.



comScore

Social Networking

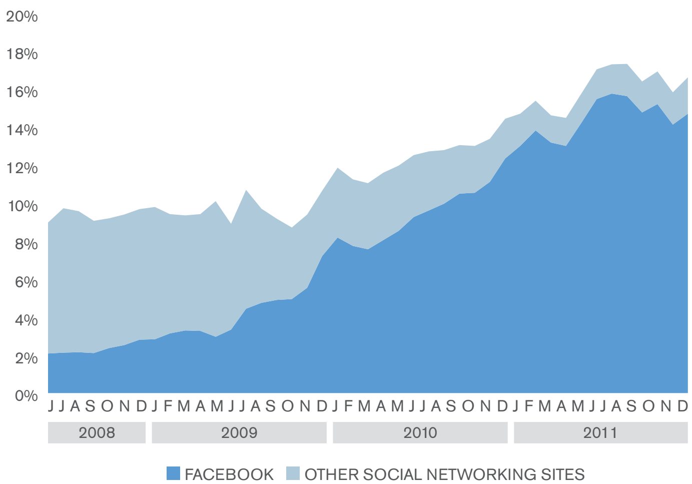
Social networking now accounts for approximately 1 out of every 6 minutes spent online

SOCIAL NETWORKING CONTINUES GROWTH IN 2011 AS ONE OF THE WEB'S TOP ACTIVITIES

Social Networking continued to gain momentum in 2011, as 9 out of every 10 U.S. Internet users visited a social networking site in a month. Social Networking now accounts for approximately 1 out of every 6 minutes spent online, with Facebook accounting for the lion's share of that engagement.

Facebook's Share of Total Time Spent Online

Source: comScore Media Metrix, Jun-2008 to Dec-2011, U.S.

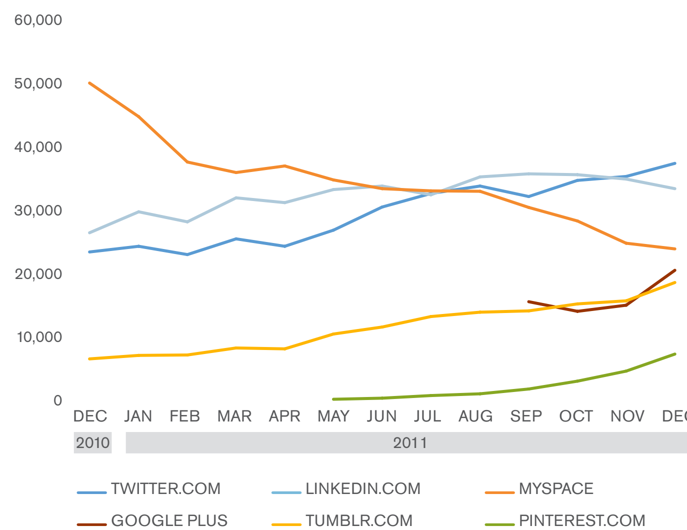


The world's most popular social networking site, which filed for its IPO on February 1, continued to gain visitors despite already reaching nearly 3 out of every 4 U.S. Internet users. Its more significant growth trend, however, was not in user growth but in average user engagement, which jumped 32 percent in the past year to just over 7 hours per visitor in December. Facebook now accounts for 15 percent of all time spent online and 16 percent of all page views.

Beyond Facebook's dominance in the social networking market, several interesting stories emerged among the second tier players. Myspace finally gave up its hold on the #2 position to LinkedIn in June, which was followed by Twitter and LinkedIn battling back and forth for that position during the second half of the year. By December, Twitter boasted the #2 spot in the category with 37.5 million unique visitors, while LinkedIn held the #3 position with 33.5 million. Myspace is still managing to hold onto the fourth position with just over 24 million visitors, though a couple of upstarts are beginning to nip at its heels.

Visitors (000) to Selected Social Networking Sites

Source: comScore Media Metrix, Dec-2010 to Dec-2011, U.S.



SOCIAL NETWORKING

"In 2012 we're going to see social media define this election. It's going to influence how people get out the vote and how online fundraising occurs."

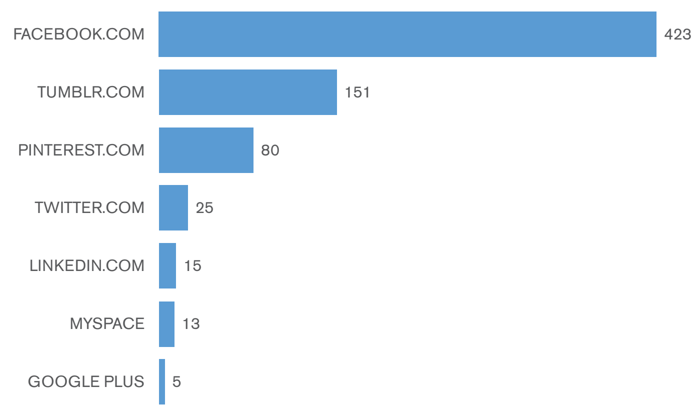
Hear more insights on the future of social media from Andrew Lipsman, comScore VP of Marketing and Industry Analysis at www.comscore.com/2012USDigitalFutureInFocus

Perhaps the most closely watched story in the social networking space this year was the June launch of Google+. With only about a half year in existence thus far, Google+ had already reached 20.7 million U.S. visitors in December. Clearly Google's big social play is already making its presence felt among the larger players in the space and will look to jump ahead of Myspace in the coming months. Not far behind Google+ is Tumblr with 18.8 million visitors. After years of slowly but steadily building traction within a core group of followers, 2011 marked a year in which Tumblr's audience moved beyond innovators into the early adopter user set. The service's popular tumblogs, which have become an Internet mainstay for people with specific interests, often feature funny or irreverent content. The critical test for Tumblr will come as it attempts to cross the chasm into the early majority and push its U.S. web penetration beyond 10 percent of the market. Another 2011 upstart worthy of mention is Pinterest, which has amassed an impressive audience of nearly 8 million visitors after barely registering on comScore's radar in the middle of the year. Defying the traditional profile of tech innovators, which tend to be 18-34 year old males living on the coasts, Pinterest has actually gained early traction among young adult and middle-aged women living in central regions of the country.

Where both Pinterest and Tumblr have also excelled is in generating strong visitor engagement. While Facebook exemplifies heavy visitor engagement with an average of 7 hours per visitor each month, Pinterest and Tumblr are the only two other sites that attract at least one hour of engagement per visitor on their primary web-based access points, though it should be noted that other social networks – such as Twitter and Google+ – may see a significant portion of their users' engagement occur via mobile access, third-party apps and/or distributed content.

Average Minutes per Visitor for Selected Leading Social Networking Sites

Source: comScore Media Metrix, Dec-2011, U.S.



Pinterest's early success has the digital world watching intently as new trends in social behavior begin to emerge. While the social networking market has traditionally been characterized by its underlying social graph, in which the connecting nodes are represented by individual users, Pinterest offers a glimpse into the emergence of the interest graph, in which shared interest becomes the primary connecting points. 2012 will be a year in which networking around shared interests takes the main stage as one of the hot topics in the social space.

comScore

Search

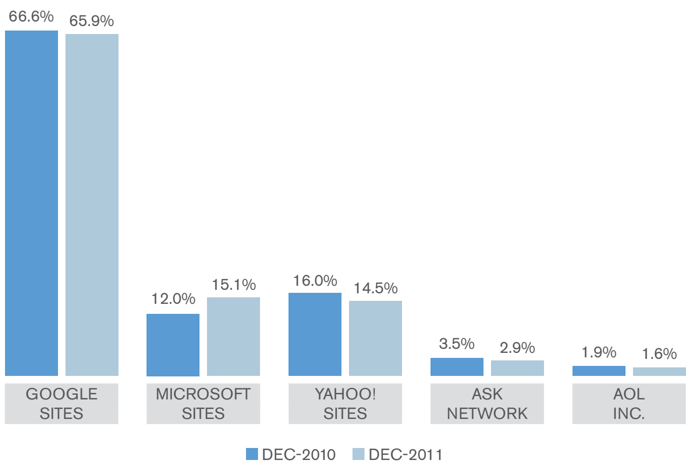
Bing captured the #2 spot for the first time on record when it surpassed Yahoo! in December 2011

GOOGLE CONTINUES TO LEAD WHILE MICROSOFT BING CLOSES OUT THE YEAR IN #2 SPOT

Google retained its position at the top of the U.S. explicit core search ranking in 2011 with 65.9 percent of searches conducted, and it has consistently attracted approximately two-thirds of the market for awhile now. One of the most notable stories in the search market in 2011 was Bing capturing the #2 spot for the first time on record when it surpassed Yahoo! in December. Following a year of consistently solid growth, Bing finished the year at 15.1 percent search market share, up 3.1 percentage points from the prior year. Yahoo! Sites ranked third in December with 14.5 percent of searches, followed by Ask Network with 2.9 percent and AOL Inc. with 1.6 percent.

Share of Explicit Searches Among U.S. Core Search Engines

Source: comScore qSearch, Dec-2011 vs. Dec-2010, U.S.



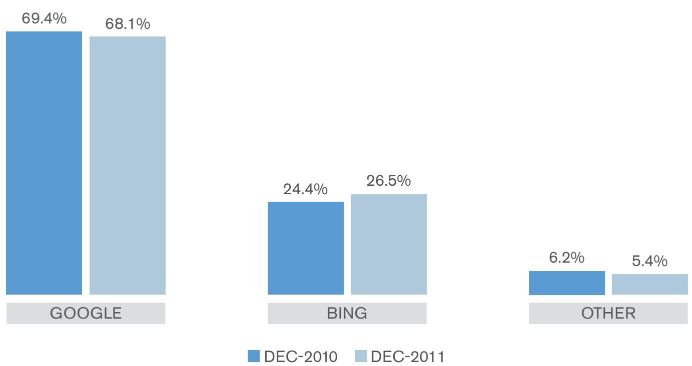
comScore

SEARCH

Although there are five primary core search engines today, the market increasingly relies on the search algorithms of Google and Bing. If we look at the share of the U.S. search market “powered by” their respective engines, we can see that Google, which also powers searches on AOL and Ask, accounts for 68.1 percent, while Bing, which also powers searches on Yahoo!, accounts for 26.5 percent. Two major search technology providers accounting for a sizeable percentage of the market appears to be stimulating a competitive environment where both providers continue to deliver innovation and an improved user experience. In particular, the increasing integration of social search technology, such as including results from Facebook, Twitter and Google+, are proving there are new and interesting ways to improve search relevance that promise to bolster the utility of search in 2012.

“Powered By” Share of Explicit Core Searches in the U.S.

Source: comScore qSearch, Dec-2011 vs. Dec-2010, U.S.



SEARCHER INTENSITY DROVE MAJORITY OF 2011 GROWTH IN U.S. SEARCH MARKET

As the web continues to grow in size and complexity, the role of search has become critical to its practicality and value. Despite the U.S. search market's overall maturity, it continued to grow at double-digit rates, posting an 11-percent increase in 2011. This growth was driven by a 3-percent gain in unique searchers and a 7-percent gain in the number of searches per searcher, highlighting that increasing search intensity per searcher explains the majority of the double-digit gain in the past year. Google's search query volume grew 10 percent, driven mostly by gains in searches per searcher (up 7 percent), mirroring the search market overall. Bing achieved the highest growth in search query volume at 40 percent, propelled by sizeable gains in both unique searchers (up 6 percent) and searches per searcher (up 31 percent). With the U.S. being a very mature market for search, continued volume increases will rely on driving a greater number of searches per searcher, which ultimately depends on delivering more value to the end user with high quality search results.

U.S. Explicit Core Search Percent Change

Source: comScore qSearch, Dec-2011 vs. Dec-2010, U.S.

	Searches	Unique Searchers	Searches per Searcher
Total Internet	11%	3%	7%
Google Sites	10%	2%	7%
Microsoft Sites	40%	6%	31%
Yahoo! Sites	1%	-2%	3%
Ask Network	-8%	0%	-7%
AOL Inc.	-8%	-19%	14%

43% more Americans watch online video content on an average day now than a year ago

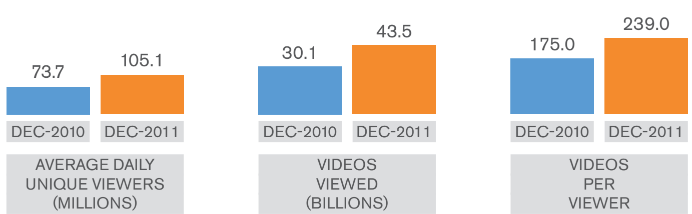
Online Video

MORE VIEWERS STREAMED MORE VIDEOS MORE OFTEN

In 2011, Americans viewed more online video content than ever before, as evidenced by strong increases across several key viewing metrics. More than 100 million Americans watched online video content on an average day, representing a 43-percent increase versus year ago. In addition to more daily viewers, the number of video streams jumped 44 percent to 43.5 billion in December 2011. One of the key behavioral shifts in online video continues to be the increasing adoption of long-form video content viewing, as Americans watch shows and movies on-demand over the Internet. As a result, we observed the average number of minutes per video view rise from 5.0 minutes to 5.8 minutes by the end of 2011 with the average viewer watching 239 videos (up 37 percent). These key indicators also point to a healthy and growing video marketplace, both in volume and intensity. As video continues to infuse the web experience across content categories and individual properties, we should expect to see these numbers climb even higher in the coming year.

Growth in Total Online Video Content Market

Source: comScore Video Metrix, Dec-2011 vs. Dec-2010, U.S.



comScore

ONLINE VIDEO

"comScore expects the number of videos viewed to continue to increase in 2012 with one of the primary driving reasons being an increase in quality, original, created-for-the-web content syndicated across platforms."

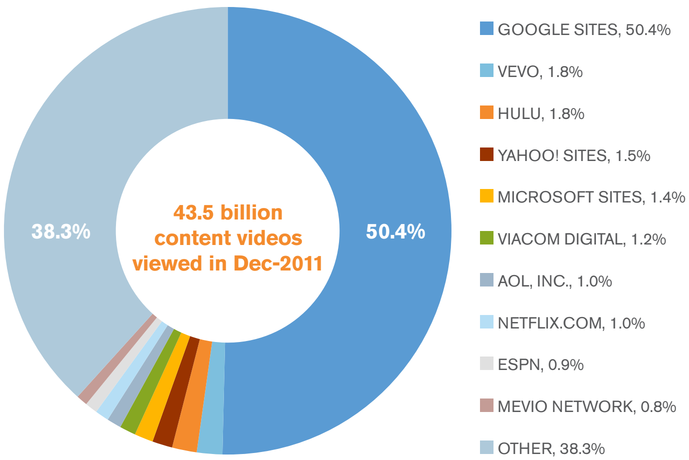
Hear more insights on the future of online video from Dan Piech, comScore Product Manager for Online Video at www.comscore.com/2012USDigitalFutureInFocus

YOUTUBE OWNS NEARLY HALF OF U.S. ONLINE VIDEO MARKET

In December 2011, Americans viewed 43.5 billion content video streams online. Google Sites, driven primarily by video viewing at YouTube.com, reigned at the top of the leaderboard with more than 21.9 billion video views, representing half the total video market. VEVO ranked a distant second with 801 million content videos streamed (1.8 percent), followed by Hulu with 777 million videos (1.8 percent) in third. Meanwhile Netflix.com had 431 million videos views during the month, representing 1.0 percent of the market. While YouTube remains the dominant provider of online video, the market provides valuable advertising real estate that supports strong monetization for a host of video publishers. Video ads deliver significantly higher CPMs on average than traditional display ads as the combination of sight, sound and motion of online video offers a particularly attractive venue for advertisers.

Share of Content Videos Viewed

Source: comScore Video Metrix, Dec-2011, U.S.



comScore

YOUTUBE PARTNER CHANNELS ATTRACT LOYAL FOLLOWING

Given the established dominance of YouTube in the video landscape, comScore launched YouTube Partner Reporting in July 2011 to provide more granular measurement of viewership and audiences across thousands of individual YouTube partners and their channels. VEVO maintained a strong footing on the top spot with 53.5 million viewers in December and 782 million videos viewed. Warner Music ranked second with 31.7 million viewers and 207 million videos. Machinima, which ranked in third place in unique viewers (22.7 million) demonstrated particularly strong engagement among its loyal following, ranking second in terms of videos viewed (340 million) and minutes per viewer (63.9), and first in terms of videos per viewer (15). The Game Station also displayed a high intensity of viewership, averaging 13.1 videos and 61.3 minutes per viewer in December. As the YouTube partner channels demonstrate a reliable ability to deliver millions of highly-engaged viewers each month, advertisers are taking notice. Increasingly we should expect to see the online video market take its cues from the TV world, as professionally-produced – or at least non-amateur – video content becomes the norm and viewers watch their content via channels.

YouTube Partner Channels Ranked by Unique Video Viewers

Source: comScore Video Metrix, Dec-2011, U.S.

	Total Unique Viewers (000)	Videos (000)	Videos per Viewer	Minutes per Viewer
VEVO @ YouTube	53,464	782,292	14.6	66.9
Warner Music @ YouTube	31,665	206,538	6.5	29.2
Machinima @ YouTube	22,737	340,058	15.0	63.9
Maker Studios @ YouTube	10,404	81,115	7.8	29.7
FullScreen @ YouTube	9,698	41,523	4.3	18.1
Big Frame @ YouTube	8,336	43,418	5.2	19.3
Collective @ YouTube	7,328	59,485	8.1	24.6
Demand Media @ YouTube	7,299	19,646	2.7	9.3
IGN @ YouTube	6,967	28,035	4.0	17.5
Bigpoint @ YouTube	5,772	29,015	5.0	19.8
The Game Station @ YouTube	5,014	65,539	13.1	61.3
Warner Bros (The Ellen Show) @ YouTube	4,880	19,199	3.9	15.6
Clevvertv @ YouTube	4,805	9,476	2.0	7.9
Revision3 @ YouTube	4,712	15,935	3.4	15.7
google @ YouTube	4,605	5,865	1.3	4.3

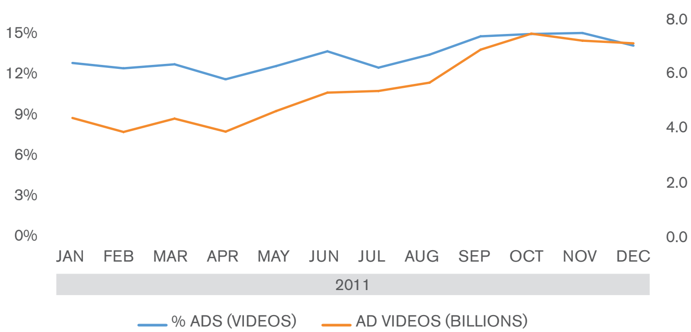
ONLINE VIDEO

VIDEO ADVERTISING CONTINUES GROWTH TRAJECTORY

Video advertising has continued to grow in 2011 as it becomes a more appealing medium for advertisers looking for attractive inventory adjacent to highly engaging content. But as with TV, the ratio of ads to content must be set at an appropriate level in order to maintain such user engagement. The volume of video ads streamed across the Internet increased 20 percent versus the previous year to 7.1 billion in December, but the ratio of the number of video ads to total videos grew at a somewhat more muted rate from 12.8 percent to 14.1 percent. Viewer tolerance, as well as the popularity of paid premium video services, will ultimately determine whether we see the ratio of video ads streamed across the total Internet continue to grow or stabilize over time.

U.S. Video Advertising as a Percentage of Total Online Video Consumption

Source: comScore Video Metrix, Jan-2011 to Dec-2011, U.S.



Digital Advertising

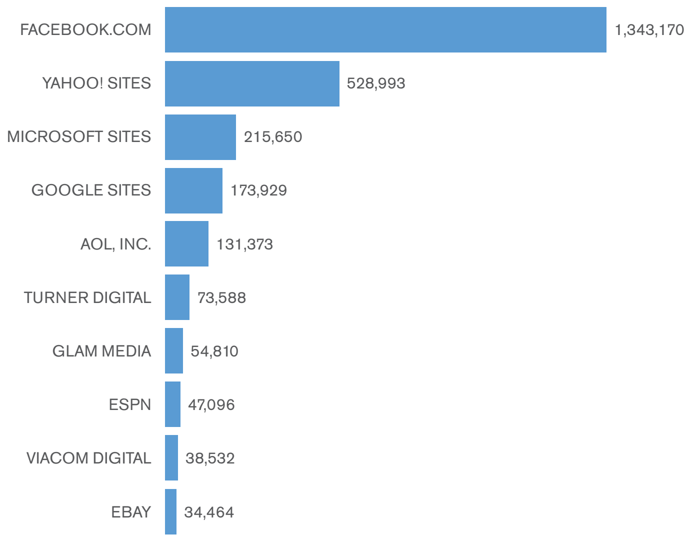
An increasing number of large brand advertisers delivered at least 1 billion display ad impressions per quarter in 2011

The past few years have seen a rapid evolution of the display advertising space with significant advancement in advertising technology, creative units and targeting capabilities, delivering more value for advertisers and publishers alike. As ad targeting improves and display ads reach consumers across the marketing funnel, this segment of the online display ad market is poised for continued growth as a strong second player to search advertising.

FACEBOOK DELIVERS 1 OF EVERY 4 ONLINE DISPLAY ADS

Among the many beneficiaries of the growth and innovation in display advertising are web publishers. The leading U.S. publisher of display ads in 2011 was Facebook with more than 1.3 trillion impressions (27.9 percent market share), more than double that of #2 publisher Yahoo! Sites at 529 billion impressions. Microsoft Sites followed as the third largest display ad publisher with more than 215 billion impressions, while Google Sites delivered 173.9 billion impressions, the majority of which were seen on YouTube. Advertising on Facebook, which combines many of the attributes of search such as granular targeting, small ad formats and self-purchased ad buys, presents a unique offering for many marketers looking to bridge their search and display advertising.

Top Ten U.S. Online Display Ad Publishers by Number of Impressions in Millions
Source: comScore Ad Metrix, Jan-2011 to Dec-2011, U.S.



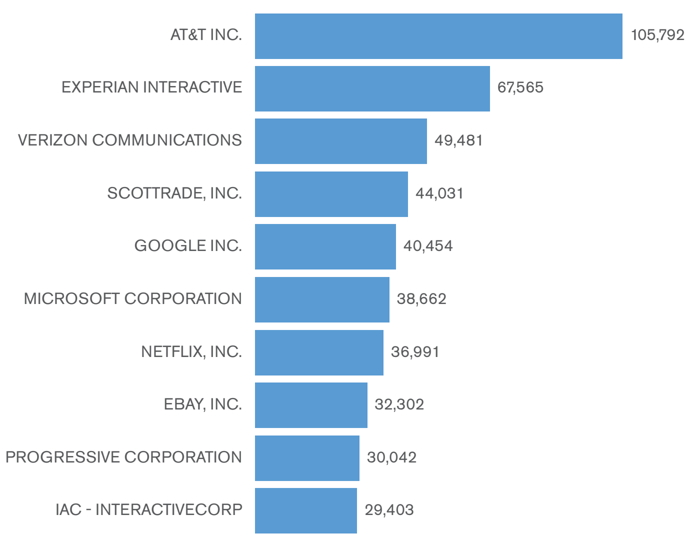
comScore

DIGITAL ADVERTISING

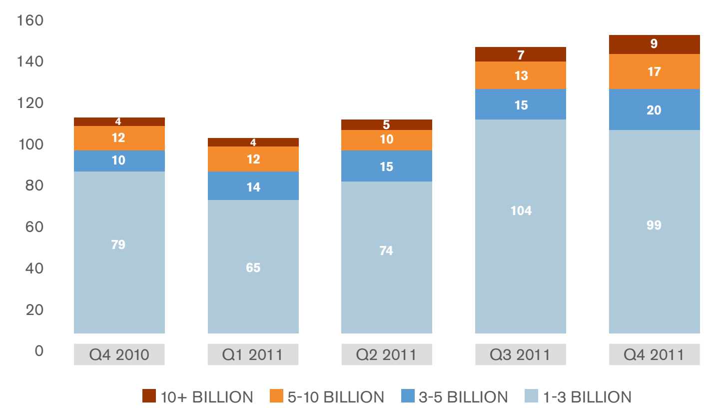
AT&T, which has been the top display advertiser for the past several years, maintained its leadership position delivering 105.8 billion ad impressions in 2011. Fellow telecom company Verizon Communications ranked third with 49.5 billion impressions during the year. Other top display advertisers included Experian Interactive with 67.6 billion display ad impressions, many of which featured its credit scoring services, while Scottrade, Inc. ranked #4 with 44 billion impressions. Google Inc. made its debut in the top 10 display advertisers, delivering more than 40.4 billion display ad impressions, featuring heavy promotion of services such as Google Chrome, Google Offers and Google+.

Large brand advertisers continued to grow their investment in digital advertising in 2011 marked by an increasing number of advertisers delivering at least 1 billion display ads per quarter throughout the year. In Q4 2011, 145 different advertisers delivered more than 1 billion display ad impressions, an increase of 38 percent from Q4 2010. The number of advertisers delivering at least 3 billion impressions grew from 26 to 46 during that same timeframe. Such increased digital investment among these large advertisers suggests a growing comfort level with the medium in terms of delivering effective brand-building advertising to the desired consumer targets.

Top Ten U.S. Online Display Advertisers by Number of Impressions in Millions
Source: comScore Ad Metrix, Jan-2011 to Dec-2011, U.S.



Number of Advertisers Delivering at Least 1 Billion Display Ad Impressions per Quarter
Source: comScore Ad Metrix, Q4 2010 - Q4 2011, U.S.



DIGITAL ADVERTISING

TRANSPARENCY AND ACCOUNTABILITY FOCUS OF DIGITAL ADVERTISING IN 2012

It's no secret that the online advertising industry has long held the promise of being the most measureable of all media. And while in many ways this is true, the increasingly complex nature of the online advertising ecosystem has made validation of ad delivery more difficult and hindered the flow of ad dollars online. To better understand some of these ad delivery issues, comScore conducted a U.S.-based Charter Study in December 2011 involving 12 national brands, 3,000 placements, 381,000 site domains and 1.7 billion ad impressions.

"2012 is going to be the year where online advertising effectiveness measurement will finally make sense."

Kirby Winfield, comScore SVP for Corporate Development

Topline study results were eye-opening, demonstrating a clear need for greater transparency and accountability across the industry, a trend that will certainly pour into 2012 and beyond:

- **Visibility:** Across all charter campaigns measured, 69 percent of the ad impressions were classified as being in-view. The remaining 31 percent were delivered but never seen by a consumer, a likely result of a consumer scrolling past the ad before it loaded or a consumer never scrolling the ad into view. In-view percentages varied by site and ranged from 7 percent to 91 percent.
- **Geographic Validation:** An average of 4 percent of ad impressions were delivered outside the desired geography, but individual campaigns ran as high as 15 percent. In many cases, ads were served in markets where the advertised product was not sold, meaning wasted ad spend and sub-optimal effectiveness results
- **Brand Safety:** 72 percent of Charter Study campaigns had at least some ads running next to content deemed "not brand safe" by the advertiser, meaning that the content is classified as objectionable by the brand. This type of unsafe delivery has the potential to damage the brand, creating a difficult situation for all members of the digital advertising ecosystem.
- **Target Audience:** While the largest number of ad placements in the Charter Study leveraged content-based targeting, many were also bought using audience targeting. Of all of the placements that leveraged audience targeting, 73 percent of the impressions were targeted based on behavioral attributes, not simply age, gender or household income. This finding alone indicates an increasing use of behavioral targeting in display advertising, a trend that will likely persist in 2012. Additionally, of the audience-targeted placements evaluated in the study, validated delivery ranged from 14-96 percent, suggesting flaws in cookie-based audience targeting and substantiating a need for this validation.

By bringing these and other similar issues associated with digital ad delivery and validation to the forefront, the industry will be able to place a fairer value on online ad inventory, thus improving the balance between advertising supply and demand. As we come to better understand advertising delivery, as well as leverage new tools to validate delivery and course-correct while in-flight, all players will have more confidence in this medium as an advertising channel, helping digital to reach its full potential.

Smartphone adoption now reaches 2 in 5 mobile Americans

Mobile

SMARTPHONES AND TABLETS REDEFINE MEDIA CONSUMPTION

2011 was undoubtedly the year of mobile as the rapid adoption of smartphones created a growing population of ever-connected consumers, while tablets became the media companion of choice for a growing number of Americans. Both smartphones and tablets have altered the digital ecosystem as an increasing amount of media is consumed away from the classic web (computers), a trend that is poised to accelerate into 2012. Several key milestones reached during the year demonstrate the rise of the mobile consumer and point to an exciting year ahead for the industry.

January 2011
Android surpasses RIM to lead smartphone market

July
smartphones account for the majority of new mobile device acquisitions for the first time

September
majority of mobile phone owners use mobile media

December
smartphone penetration reaches 2 in 5 mobile users

ANDROID AND APPLE DEVICES IN THE HANDS OF 3 IN 4 SMARTPHONE OWNERS

Smartphone adoption reached 42 percent of mobile subscribers for the three-month average period ending December 2011, increasing 15 percentage points during 2011 and representing an additional 35 million smartphone device owners. In July 2011, smartphones accounted for the majority of new mobile phone purchases for the first time, quite a change from the beginning of 2009 when smartphones accounted for just 18 percent of new device purchases. At the end of 2011 there were more than 400 smartphone devices on the market in the U.S., supplying consumers with a plethora of options when choosing a device.

Android and Apple dominated the smartphone narrative in 2011, with a combined market share of more than 75 percent in December 2011. Android in particular saw impressive growth in 2011, surpassing RIM to lead as the top smartphone platform in January 2011. Android devices accounted for 47.3 percent of the smartphone market in December 2011, an 18.6-point increase versus the previous year, driven by the proliferation of the OS across devices and carriers. Just three years after the first Android-operated device was released in October 2008 with the T-Mobile G1, the Android installed audience base eclipsed 40 million U.S. users with the platform showing continued growth into 2012.

MOBILE

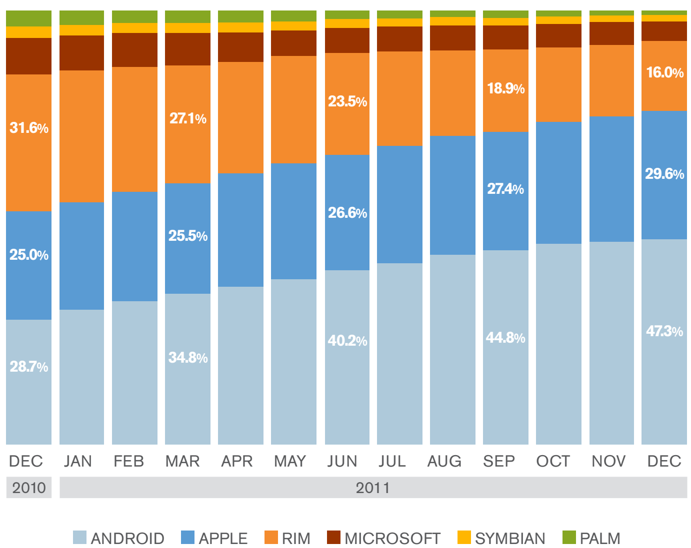
"We are entering a new digital era, an era where people are connecting with content and with brands through multiple screens – through their PC, TV, smartphone, and media tablets, we call this the rise of the Digital Omnivore."

Hear more insights on the future of mobile from Mark Donovan, comScore SVP for Mobile at www.comscore.com/2012USDigitalFutureInFocus

2011 was also a strong year for Apple, which saw the iPhone debut on two additional carriers – Verizon in February and Sprint in October – as well as the release of the iPhone 4S in October. Apple accounted for 29.6 percent of the smartphone market in December, an increase of 4.6 percentage points from the previous year. With the iPhone 5 rumored to be on the horizon for 2012, Apple looks to deliver another highly anticipated device to continue growing its smartphone audience.

Smartphone Platform Percent Share

Source: comScore MobiLens, 3 mon. avg. ending Dec-10 to Dec-11, U.S.



The year was not as favorable for other players, with RIM slipping from its once dominant position in the smartphone market to just 16 percent market share by the end of 2011. The appointment of a new CEO in January 2012 has RIM looking to attempt to regain some position in the marketplace. Microsoft shed 3.8 percentage points to finish out the year with 4.7 percent of the market, although the OS is approaching 2012 aggressively with the release of the recently announced Nokia Lumia 900.

MOBILE

MOBILE POISED TO PLAY A CENTRAL ROLE IN RETAIL IN 2012

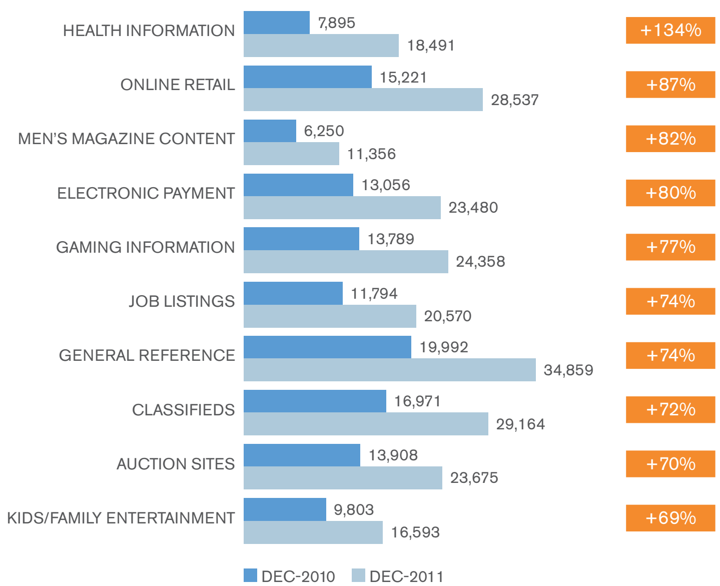
Mobile phones proved to be an integral channel for communication, information and entertainment in 2011. A look at some of the top mobile activities for smartphone and feature phone owners in 2011 found that nearly 3 in 4 Americans texted in December, while 3 in 5 used their phone for taking photos and slightly more than 1 in 4 captured video on their mobiles. 2011 saw slightly more Americans accessing applications (47.6 percent) than their mobile browser (47.5 percent), a reversal from a year ago, as the increasing number of apps and smartphone penetration fueled usage. 41 percent of mobile users accessed email from their device, with 35.3 percent social networking on their phone.

A look at the fastest-growing activities for mobile users revealed consumers increasingly turning to their device for retail and commerce, a trend that many mark as among the most important for manufacturers and retailers in 2012. The disrupting force of mobile in the retail environment provides new opportunities for brands to reach customers through the most personal and ubiquitous digital channel, while at the same time presenting challenges for retailers as consumers consult their new favorite shopping companion – their smartphone – while in stores. In December 2011, 28.5 million mobile users accessed online retail content on their mobile devices, up 87 percent from the previous year, and with no signs of slowing in 2012. Commerce-related content also saw gains including Electronic Payments (up 80 percent), Classifieds (up 72 percent), Auction Sites (up 70 percent) and Shopping Guides (up 67 percent).

Health Information has continued to gain popularity among mobile users, leading as the top-growing content category in 2011, surging 134 percent to reach 18.5 million mobile users as this emergent category amassed a growing and significant audience base. With more mobile health startups entering the field and traditional health information providers improving their mobile strategies, look for 2012 to see this area develop further.

Top Mobile Categories by Growth in Audience (000)

Source: comScore MobiLens, 3 mon. avg. ending Dec-2011 vs. Dec-2010, U.S.



comScore

MOBILE

DIGITAL OMNIVORES HERALD DAWN OF NEW ERA IN CONSUMPTION

Discussing 2011's mobile environment and the future would not be complete without addressing the rapidly developing tablet market. In 2011 consumers had the choice of more than one hundred distinct tablet devices with several highly-publicized releases including the iPad2, Kindle Fire, NOOK Tablet and Samsung Galaxy S fueling market adoption. To put the rapid uptake of tablets in perspective, it took seven years to reach nearly 40 million smartphones compared to less than two years to reach nearly 40 million tablets, demonstrating the vast appeal of these devices and consumers' desire for connection.

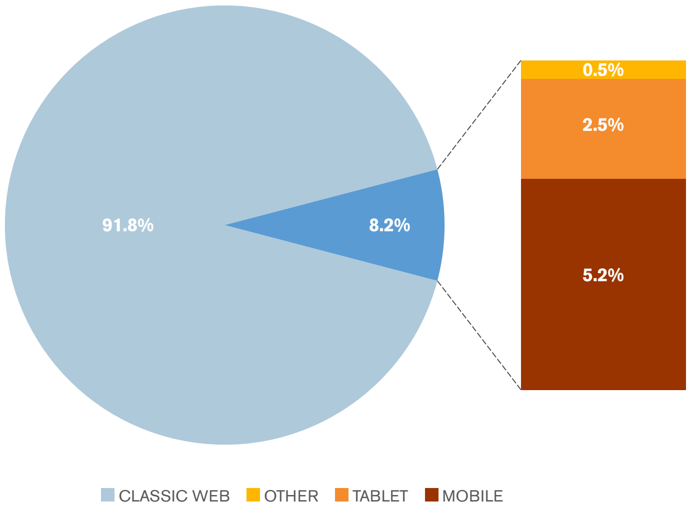
The rise of smartphones and tablets have drastically altered consumers' digital media consumption changing the way people access content, where they consume it and the frequency of consumption. This evolution of digital device interaction has given rise to an age of 'digital omnivores' – consumers who access content through several touch points during the course of their daily digital lives. In December 2011, 8.2 percent of all digital traffic (page views) occurred outside of the classic web, with mobile accounting for 5.2 percent of traffic, tablets driving 2.5 percent and other connected devices accounting for less than a percent. In many cases smartphones and tablets have provided incremental reach and engagement to classic web activities, while for others, such as map content and email, these devices have started to cannibalize this behavior on the classic web.

Smartphones and tablets are poised to disrupt the digital ecosystem even further in 2012 as adoption rates continue to climb and the availability of optimized content increases. Understanding complementary device usage across the classic web, smartphones, tablets and other connected devices will become a critical necessity for advertisers and publishers utilizing a multi-platform approach to reach today's digital omnivore.

For more insights into the future of mobile, stay-tuned for our 2012 Mobile Future in Focus report to be released later this month.

Share of Connected Device Traffic in the U.S.

Source: comScore Device Essentials, Dec-2011, U.S.



comScore

2011 was a strong year for retail e-commerce, significantly outpacing growth at brick-and-mortar retail

E-Commerce

ONLINE SPENDING RETURNS TO STRONG DOUBLE-DIGIT GROWTH RATES IN 2011

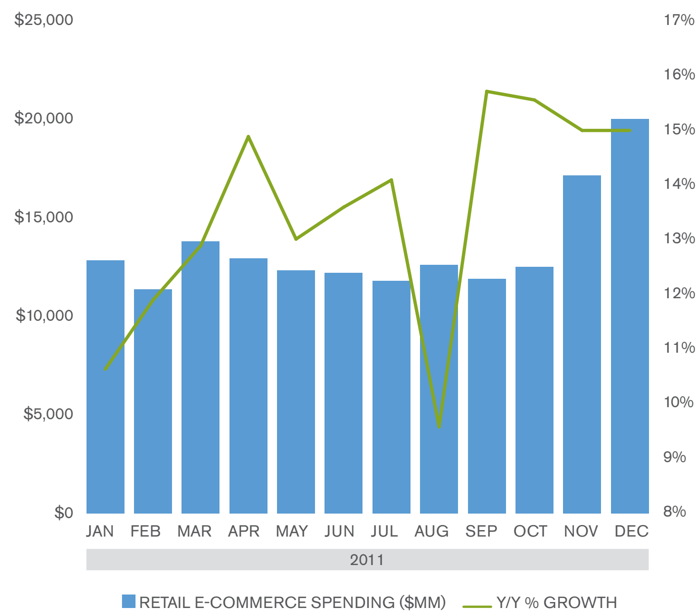
Despite the backdrop of continued economic uncertainty, 2011 was a strong year for retail e-commerce. Throughout the year, growth rates versus the prior year remained in double-digits to significantly outpace growth at brick-and-mortar retail. Consumers remained cautious spenders overall, but increasingly turned to digital commerce due to two prevailing factors: price and convenience.

Total U.S. e-commerce spending reached $256 billion in 2011, up 12 percent from 2010. Travel e-commerce spending grew 11 percent to $94.5 billion, while retail (non-travel) e-commerce spending jumped 13 percent to $161.5 billion for the year.

The 2011 holiday season represented the exclamation point for this strong year in online retail, with growth rates surging to 15 percent for the season – the highest rates observed since 2007. Strength in the online retail sector reflected consumers' response to the attractive prices, discounts and deals offered online – with "free shipping" being the most prevalent – but also some signs of improved sentiment. Not surprisingly, November ($17.2 billion) and December ($20.0 billion) were the heaviest online spending months of the year, with their growth rates a few percentage points higher than what was observed during the first three quarters of the year (Note: November and December growth rates calculated based on comparable shopping days in 2010, not calendar dates.)

2011 U.S. Retail E-Commerce Spending ($MM) and Y/Y Growth Rate by Month

Source: comScore E-Commerce Measurement, U.S.



comScore

E-COMMERCE

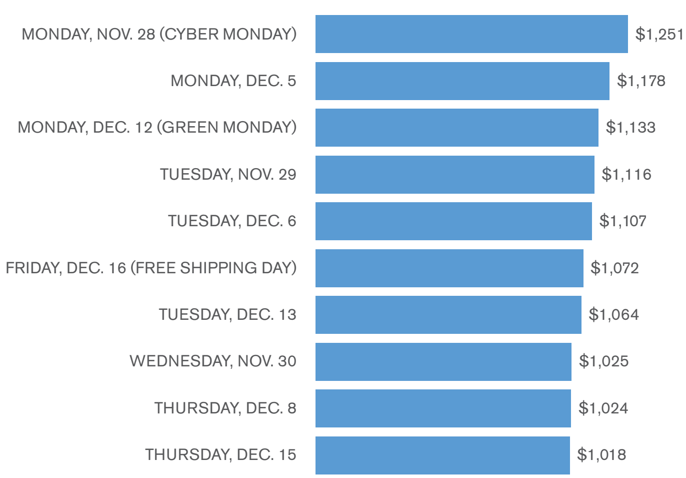
"Brick-and-mortar retailers are really uncertain about the impact of smartphones. Some of them have described it as their worst nightmare… the retailer is competing with the Internet while the consumer is physically still in the store."

Hear more insights on the future of e-commerce from Gian Fulgoni, comScore Chairman and Co-Founder at www.comscore.com/2012USDigitalFutureInFocus

$1.25 BILLION CYBER MONDAY RANKS AS TOP ONLINE SPENDING DAY OF 2011

The heaviest individual spending day of the year was Cyber Monday (Monday, November 28, 2011) at $1.251 billion, representing the second consecutive year in which Cyber Monday has ranked as the top online spending day of the season. Cyber Monday led this past year's cavalcade of billion dollar spending days, with ten individual days surpassing that threshold in the holiday season alone. Monday, December 5 ranked second at $1.178 billion, followed by Green Monday (Monday, December 12) at $1.133 billion.

Top 10 U.S. Online Retail Spending Days in 2011 in Millions
Source: comScore E-Commerce Measurement, U.S.



comScore

E-COMMERCE

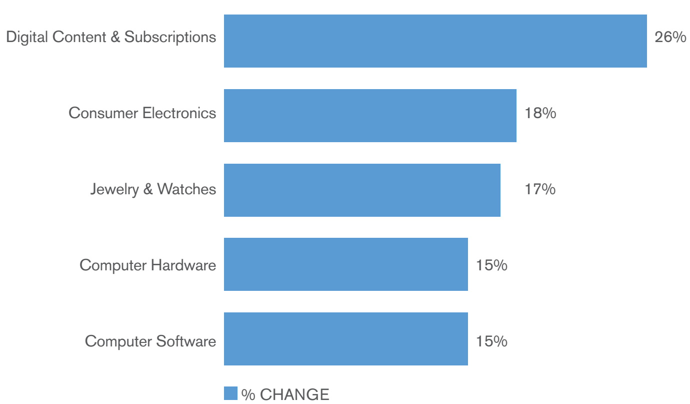
DIGITAL CONTENT & SUBSCRIPTIONS RANK AS TOP GROWING ONLINE RETAIL PRODUCT CATEGORY IN 2011

Digital Content & Subscriptions, a category predominantly composed of digital content downloads such as music, movies, TV shows and e-books, ranked as the fastest-growing retail e-commerce category in 2011 with a 26-percent growth rate. An acceleration of e-book downloads as tablets and e-readers gain in popularity represented a strong driver of this growth.

Consumer Electronics ranked as the second fastest-growing category this year at 18 percent, driven by low-priced flat panel TVs, tablets and e-readers. Jewelry & Watches, which grew 17 percent, also had a strong year as Americans reveal their taste for luxury goods once again as we climb back from the recession.

Top 5 Growing U.S. Retail E-Commerce Categories in 2011

Source: comScore E-Commerce Measurement, 2011 vs. 2010, U.S.



Americans' online shopping behavior over the past year suggest a preference for the latest electronic gadgets and their complementary items, a trend that is likely to accelerate as tablets and e-readers gain mainstream adoption. It is important to remember that these are still relatively nascent markets and that high product price points have kept these devices out of the hands of many Americans. But with Amazon leading the way in making these products more affordable to the average consumer, they are likely to become an even more significant driver of e-commerce activity in 2012.

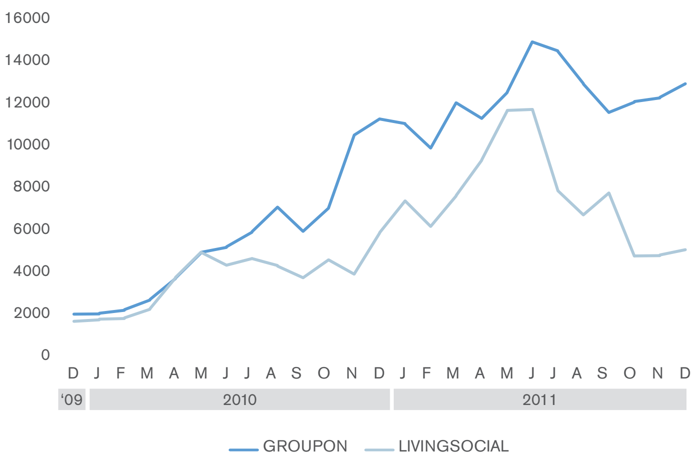
E-COMMERCE

DAILY DEAL-BUYING TAKES OFF, THEN STABILIZES

One of the hottest digital markets to emerge in the last couple of years is the daily deal phenomenon, led by market leader Groupon, which had its IPO in early November. According to site visitation patterns, which are a function of both organic interest in the service and marketing expenditures, a market that experienced nearly universal gains in 2010 has begun to experience uneven traffic patterns over the past year. Groupon.com finished the year with 12.5 million visitors via the classic web, marking a 15-percent increase in the past 12 months but a decline from its peak of 14.5 million visitors in June. LivingSocial, meanwhile, saw its traffic surge early in the year to 11.2 million visitors – in part due to some popular deals with Amazon and Whole Foods – but saw the number of visitors pull back to 4.5 million by December.

Groupon and LivingSocial Visitors (000)

Source: comScore Media Metrix, Dec-2009 to Dec-2011, U.S.



Is daily deal fatigue becoming a factor? It is possible that some consumers have increasingly begun to tune out the onslaught of daily emails. But it may also reflect the market coming into equilibrium as business models are fine-tuned for sustainability and outsized marketing expenditures are reduced. It is also likely that more consumers are using their mobile devices instead of the classic web to take advantage of daily deals. Especially as these companies go public and there is an increasing need to balance the top line and bottom line, it's possible that greater stabilization may occur in the year ahead. Many consumers will possibly look to prune their number of daily deal subscriptions in 2012, which could mean more consolidation in the long tail and potentially greater market power for the largest providers. Improved targeting mechanisms for consumers and better deal optimization tools for merchants will help ensure a strong value proposition for all constituents, as 2012 will mark a year of maturation for the daily deal sector.

comScore.

2012: Putting the Future in Focus

CONCLUSION

FACEBOOK IPO RAISES THE PROFILE OF SOCIAL NETWORKING AND DIGITAL ADVERTISING

Facebook's $5 billion public offering, the largest ever U.S. tech IPO, has demonstrated the true power of social media as a profitable enterprise. With a rumored valuation of as high as $100 billion, Facebook has built a company worth as much as McDonald's in just eight short years. But Facebook is not alone in flexing its muscle on the public markets, with 2011 seeing the successful IPOs of LinkedIn, Zynga and Groupon, while Yelp has also filed for a 2012 offering. As these companies take the public stage, it's clear that social media has the ability to drive fast-growing and profitable businesses.

The strength underlying most of these businesses is the network effect, which says that the more users that enter the system, the more value it creates for other users. This elicits greater participation and interaction among existing users, which attracts even more users and creates a virtuous cycle of user growth. As users become more deeply ingrained into the service, switching costs become high and winner-take-all markets occur – at least within particular market segments. Network effects have been critical to the success of many leading Internet companies, such as Microsoft, eBay and Amazon, and are playing out in a similar fashion for these social media sites.

As network effects drive user growth and engagement, it opens the doors to robust advertising-based businesses. As the top U.S. display ad publisher, Facebook is driving billions per year in ad revenue and reportedly hopes to add to its totals by monetizing its substantial mobile traffic. The digital advertising market is growing quickly as large brand advertisers continue to ramp up their investment in the medium, which is just another indication that the wind is at the backs of Facebook and other social media companies as they take center stage on the stock market.

CONCLUSION

2012: Putting the Future in Focus

2012 SUMMER OLYMPICS ILLUMINATE THE RISE OF MULTIMEDIA CONSUMPTION

As the largest global sporting event, the Olympics in many ways represents the pinnacle of media coverage with a virtually continuous broadcast of the seventeen day event's triumphs and tribulations. With the continued evolution of media platforms, we can expect that the upcoming 2012 Summer Olympics in London will see the most expansive use of multimedia to ensure that viewers have access to the latest events and highlights wherever they may be.

Expect that smartphones and tablets will play an increasingly important role in the Olympic Games as fans view events and keep up to date on their national teams on these various devices. For some perspective, consider that during the 2010 Olympic Games in Vancouver, the iPad was still just a rumor and the number of smartphone owners was less than half its current size. Now both tablet and smartphone users represent a substantial audience, not just for the Olympics, but for the many large advertisers that align themselves with the Games.

Social media also promises to play an important role in this year's Olympics as citizens around the world connect to share, in real-time, the joy of victory and the agony of defeat. With each Olympics, historic feats will be achieved and moments of national glory captured for posterity, and we can be certain that this year's games will feature a global community that is more connected – and interconnected – than it has ever been before.

comScore

CONCLUSION

2012: Putting the Future in Focus

SOCIAL MEDIA A DEMOCRATIZING FORCE AHEAD OF U.S. PRESIDENTIAL ELECTION

What was once dismissed as a leisure-oriented activity, social networking has reached new heights of legitimacy as a force for democratization, transparency and as a shaper of global movements. Events such as the 2011 Arab Spring saw social media play a leading role in revolutions across the globe, acting as a catalyst for the dissemination of ideas and the organization of people around a common cause. On a domestic level, social media has been an organizing force behind political movements such as Occupy Wall Street, where it connected people both physically, around common organizing locations, and emotionally, around a common spirit of indignation at an unfair system.

As we approach the 2012 U.S. Presidential Election, social media will play a significant role in the battleground of ideas between the presidential candidates, and will be used by their campaigns to mobilize voters. Candidates first embraced social media as a meaningful part of their campaign strategy in 2008, but they were only at the tip of the iceberg. Today the digital landscape is vastly different from the last election, requiring significantly more investment in social and digital strategies in order to reach voters. In November 2008, for example, Facebook had just 45 million U.S. visitors, compared to December 2011 when the site reached more than 160 million. Twitter, with less than 2 million visitors a month, wasn't even on campaign radars and barely any politicians had even heard of the social media tool that virtually every one of them would be using by the following year. In the 2012 election, candidates who do not have well-designed and well-executed social media strategies lose the ability to effectively engage their constituents and compel them to action.

Social media will not only be used as a tool for organizing and getting out the vote, but also for online fundraising, which increases in importance with every election cycle. Expect to see social media accelerate the intensity with which online giving occurs, as concentrated fundraising efforts – often referred to as "moneybombs" – become standard fare in the increasingly heated and competitive political environment.

Finally, digital advertising will continue to be an important aspect of the political media environment. Though we experience the constant barrage of TV ads in the lead-up to the election, campaigns are turning to display advertising early and often to help build their brands and set their narrative. Campaigns are also becoming more adept at narrowly targeting important constituencies with ad campaigns, whether according to a specific interest or geography, to ensure that the right messages reach the right voting blocs. In 2008, we saw an unlikely candidate in President Obama catch his primary and general elections by surprise with his advanced digital and social media strategies. We can be sure that in 2012, every campaign will be well-prepared and well-armed in the digital battleground.

CONCLUSION

2012: Putting the Future in Focus

MOBILE DISRUPTING THE TRADITIONAL RETAIL SALES FUNNEL

Smartphones have become consumers' most-valued shopping companion, a trend that is poised to continue in 2012 as smartphone adoption surges past 50 percent. What has been referred to by some as retailers' worst nightmare, smartphones are bringing the power of the Internet right into brick-and-mortar stores, arming consumers with the pricing power that was once reserved for the confines of their home or work online shopping experience. With just a few swipes on their touchscreen, consumers are now able to compare prices, locate a store that offers a better deal, read reviews, send product photos and more, all while standing within arms' reach of a product on the shelf and within feet of the checkout, defying the old adage that getting shoppers in the store is half the battle in making a sale.

Not only are smartphones influencing the physical shopping world, these devices, along with tablets, are disrupting the traditional sales funnel. It is not uncommon for a consumer to call upon multiple devices before completing a purchase. They may browse products on their smartphone on the commute to work, research prices on their tablet while curled up in bed for the night, and finally complete the purchase on their PC at work the next day. This new paradigm means that for traditional retailers' to successfully navigate this changing landscape in 2012 they must build strategies that address audiences across these devices throughout their shopping and purchasing process, or risk losing that customer's sale to the savvy retailer who looks for the interception by being in front of the consumer at every step of the sales funnel.

comScore

MIND THE DIGITAL OMNIVORE

Perhaps the most disruptive shift on the horizon for 2012 is the rapid adoption of smartphones and tablets. These devices change the how, when and where consumers connect to digital content, creating the most dramatic shift in digital media consumption since the advent of the personal computer. Understanding today's multi-device consumer, or what is known as the 'Digital Omnivore,' will be increasingly important for advertisers and publishers in 2012 with an eye on the two critical factors to building effective digital strategies: the incremental effect and platform cannibalization.

The incremental effect of smartphones and connected devices on reach and engagement is often substantial, especially for those categories such as news and entertainment that lend themselves particularly well to the mobile and tablet environments. For publishers, this means the potential to reach incremental audience and deliver more advertising. For advertisers, understanding unduplicated audiences across these various platforms will be critical to optimizing campaigns. For both publishers and advertisers, understanding how these devices are shifting content engagement will provide a more complete picture of today's digital consumer and further inform the allocation of digital dollars and resources.

But while these incremental opportunities abound with emerging platforms, they may also serve as very disruptive forces to current paradigms. As consumers develop preferences for using new platforms in instances where they once relied on another – such as using smartphones or tablets for browsing on the living room couch instead of using laptops – existing monetization streams are disrupted and may not be adequately replaced by the emerging channel. In 2011 we observed the marked decline of such categories as webmail, weather, maps and others on the classic web, as audiences have turned with increasing frequency to their mobile devices for these activities. Digital commerce continues to take share from traditional retail channels, a trend that will only accelerate with smartphones entering retail stores and tablets becoming a preferred source of late-night surfing. We will also see the continued cannibalization of physical products such as CDs and books as consumers use more ways than ever before to download content online.

The incremental effect and potential for cannibalization point to the rising importance of understanding complementary device usage in the coming year. Devices influence the way people consume content and it is important to remember that they do not exist in isolation of one another, but rather have a complementary relationship in consumers' lives. Understanding how consumers behave across multiple environments is the key for businesses to stay ahead of the curve and ensure their digital businesses minimize the effects of disruption and maximize the incremental opportunities.

About comScore, Inc.

comScore, Inc. (NASDAQ: SCOR) is a global leader in measuring the digital world and preferred source of digital business analytics. comScore helps its clients better understand, leverage and profit from the rapidly evolving digital marketing landscape by providing data, analytics and on-demand software solutions for the measurement of online ads and audiences, media planning, website analytics, advertising effectiveness, copy-testing, social media, search, video, mobile, cross-media, e-commerce, and a broad variety of emerging forms of digital consumer behavior. comScore services, which now include the product suites of recent acquisitions AdXpose, Nedstat, Nexius XPLORE, ARSGroup and Certifica, are used by more than 1,800 clients around the world, including global leaders such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon Services Group, ViaMichelin and Yahoo!.

For more information, please visit www.comscore.com

FOR FURTHER INFORMATION, PLEASE CONTACT:

Sarah Radwanick
comScore, Inc.
+1 206 268 6310
press@comscore.com

Andrew Lipsman
comScore, Inc.
+1 312 775 6510
press@comscore.com

comScore

Stay Connected

Follow @comscore

Available on the App Store

Methodology and Definitions

This report utilizes data from the comScore suite of products, including comScore Media Metrix, comScore qSearch, comScore Ad Metrix, comScore Video Metrix, comScore MobiLens, comScore Device Essentials and comScore E-Commerce Measurement.

COMSCORE MEDIA METRIX

The comScore Media Metrix suite of syndicated products sets the standard for digital audience measurement and media planning. Powered by Unified Digital Measurement™, the revolutionary measurement approach that bridges panel-based and website server-based metrics to account for 100 percent of a site's audience, Media Metrix delivers the most accurate and comprehensive suite of audience metrics, providing valuable demographic measures, such as age, gender, household income and household size. Media Metrix reports on more than 70,000 entities, with audience measurement for 43 individual countries and 6 global regions, as well as worldwide totals.

The comScore Media Metrix product suite includes individual products utilized within this report including comScore qSearch, comScore Ad Metrix and comScore Video Metrix.

For more information, please visit:
www.comscore.com/Products_Services/Product_Index/Media_Metrix_Suite

COMSCORE MOBILENS

comScore MobiLens provides market-wide insight into mobile digital media consumption, brand-level audience metrics, and details of device ownership and technology penetration. Using proprietary data collection methods, we survey nationally representative samples of mobile subscribers age13+ in the U.S., UK, France, Germany, Spain, Italy, Canada, and Japan. The MobiLens sample is substantial enough to provide projected data for sub-segments as small as 1 percent of mobile subscribers. The MobiLens' sampling and survey methods undergo extensive analysis and market validation including comparisons to known network operator market shares, leading handset model shares, downloading activity, and other usage metrics. For 2011, the estimated monthly survey completes utilized for this report are 10,000 mobile phone owners in the U.S. For the following analysis, the three-month average figures amount to a sample of 30,000 mobile users.

For more information, please visit:
www.comscore.com/Products_Services/Product_Index/MobiLens

comScore

METHODOLOGY AND DEFINITIONS

COMSCORE DEVICE ESSENTIALS

comScore Device Essentials provides insight into digital traffic share across all devices worldwide, offering detail into device characteristics, connection type, and category consumption. The product is based on the comScore Unified Digital Measurement (UDM) approach, measuring browser-based page views coming from computers, mobile, and other connected devices to more than one million domains tagging with comScore. Device Essentials also utilizes the comScore Client Focus Dictionary to segment connected device usage into content categories.

For more information, please visit:
www.comscore.com/Products_Services/Product_Index/Device_Essentials

COMSCORE E-COMMERCE MEASUREMENT

comScore E-Commerce Measurement provides the most accurate, timely and comprehensive view of consumers' online shopping and spending behavior. The product leverages the comScore panel of 2 million Internet users to capture actual purchase behavior from shoppers' checkout pages rather than simply relying on URL-specific page counts or measuring secure sessions. This approach gives comScore the unique ability to report e-commerce sales figures weeks before the U.S. Department of Commerce – and is consistently within a few percentage points of the Government's estimates.

For more information, please visit:
www.comscore.com/Products_Services/Product_Index/e-Commerce_Measurement

comScore