

RA RESEARCH ALERT

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Almost Half of Americans Think Cable TV Is a Waste of Money

More than four in 10 U.S. adults (45%) believe cable TV service is a waste of money, although most have not cut the cord, according to CouponCabin.com. More than eight in 10 (81%) currently subscribe to either cable or satellite TV service, while 11% previously subscribed but have canceled their service. Another 8% have never subscribed to a pay-TV service; among those ages 18-34, 15% have never subscribed.

Almost a third of pay-TV subscribers (32%) have switched to different providers because of poor service (including both customer service and technical issues). Some 15% of current TV subscribers say they'd never consider canceling their service. More than four in 10 TV subscribers (43%) say they are keeping their service because they want to retain access to live sports programming. Some 14% say they'd cancel their service if there were an alternative way to access live sports broadcasts.

Among the 91% of 18-to-34-year-olds who have broadband Internet, 13% watch TV solely online (via TV sets, computers, and/or mobile

devices), according to research by Beagle Insight and Miner & Co. Studio for Pivot. This represents 12% of the total population ages 18-34. More than eight in 10 18-to-34-year-olds (88%) are "cross-platformers"—those who have broadband Internet and subscribe to TV service (via cable, satellite, or telecommunications company). More than a quarter of adults this age (27%) subscribe to a TV service but are thinking of canceling it.

More than half of pay-TV subscribers ages 18-34 who plan to keep their subscriptions (55%) say it's because they like watching live TV shows. More than four in 10 (44%) stay because they'd miss their favorite shows if they canceled, and 32% would miss live sports.

Online-only viewers who want to resubscribe

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Three-quarters of brand fans are already customers.

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Nine in 10 Internet users lie or withhold personal data on online forms.

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Hispanic households watch more online video than average U.S. households.

Solo Dads 12
Single dads head almost one in 10 households with children.

FAST FACT:
55% of Americans admit to having used their mobile phones while driving. (Jumio; phone: 650-424-8545) **21 more factoids on page 4**

TODAY'S MEN

Men's Roles and Gender Identities Are Becoming Less Rigid

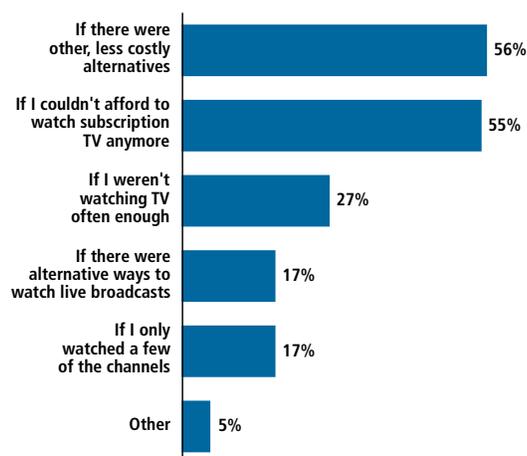
Men's roles in the home are changing, and with them their beliefs about what it means to be a man, according to a study of U.S. and U.K. men by JWT Intelligence. Three-quarters of men agree with the statement that "men and women don't have to conform to traditional roles and behavior anymore." More than six in 10 men (61%) and 72% of millennial men feel that traditional gender roles and play patterns for children aren't important. Nearly eight in 10 women (79%) agree.

More than three-quarters of men (76%) believe there is increasing pressure on them to dress well and be well-groomed; 73% think there's as much pressure on them as there is on women. Almost eight in 10 (78%) believe there's equal pressure on men and women to stay in shape/have a good body.

The majority of men consider it acceptable

Continued on page 2

CIRCUMSTANCES UNDER WHICH CURRENT PAY-TV SUBSCRIBERS WOULD CANCEL THEIR SUBSCRIPTIONS



SOURCE: CouponCabin.com



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Men's Roles

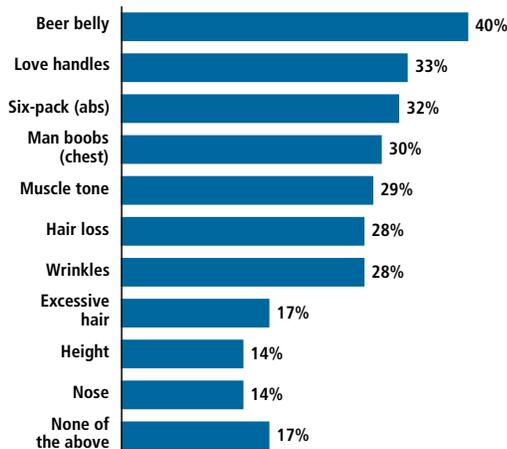
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for men to use skincare products such as moisturizer, though attitudes about men's adoption of various grooming behaviors vary by age. Millennial men are in general more likely to be accepting of men adopting traditionally female grooming practices and fashions. Gen Xers are most accepting of men wearing "feminine" colors such as pink, however (44% of Gen Xers consider this acceptable, compared

with 39% of millennials and 26% of boomers). Annual sales of men's toiletries in the U.S. are expected to reach \$3.2 billion by 2016, up \$1 billion from 2006, according to Mintel data cited. Men account for 30% of spa visits, according to SpaFinder data cited.

Men in the U.S. and U.K. consider manliness to be about manners, values, and keeping one's word, rather than income, physical strength, or power in the workplace. Even though millennials are at the forefront of the shift toward a more balanced idea of masculinity, they're also the most likely to express nostalgia for the masculine ideals of previous eras. Almost two-thirds of millennials (65%) and 58% of men overall say men seem less masculine now than they did in the past. Almost six in 10 millennials

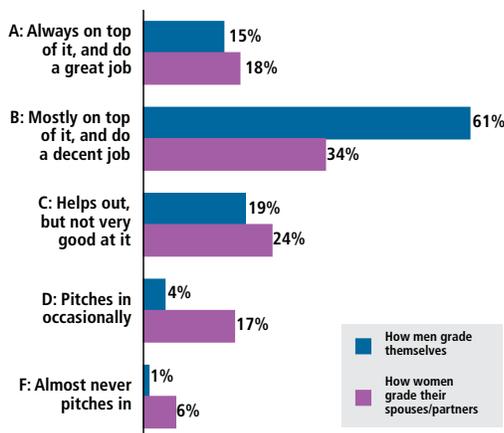
ASPECTS OF PHYSICAL APPEARANCE THAT CAUSE MEN ANXIETY



SOURCE: JWT Intelligence

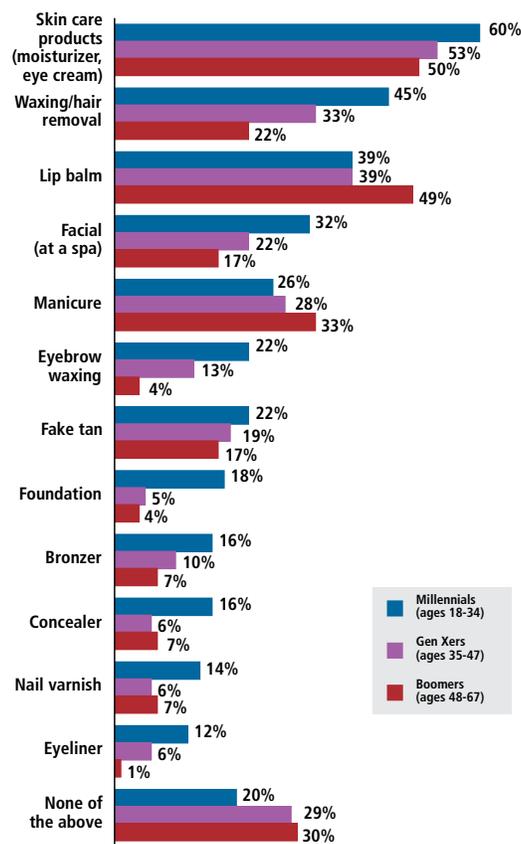
HOW MEN AND WOMEN GRADE MEN'S PARTICIPATION IN HOUSEWORK

(Among married or partnered U.S. and U.K. men and women)



SOURCE: JWT Intelligence

GROOMING PRODUCTS AND PRACTICES MEN CONSIDER ACCEPTABLE FOR OTHER MEN TO ADOPT, BY AGE



SOURCE: JWT Intelligence

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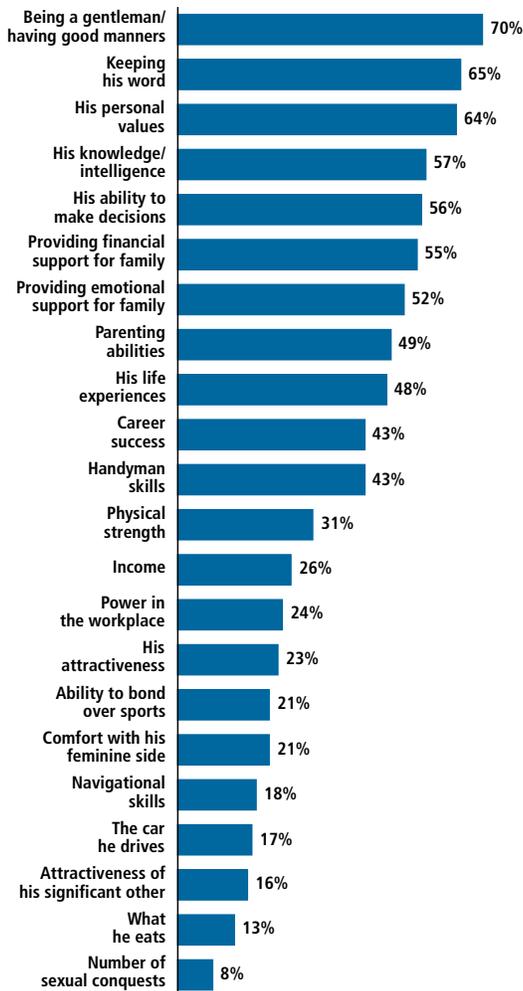
Men's Roles

Continued from page 2

(58%) and 51% of men overall say their idea of what it means to be a man is no longer widely accepted in society. More than half of millennials (53%) and 38% of men overall feel that there aren't many opportunities to do "guy stuff" these days.

Although men with children do more than twice as much housework now as they did in 1965, according to Pew Research Center data cited, there are significant gaps between how much work men say they do around the house and how much work women say men do. For example, about half of married/partnered men say they're the ones who do the lion's share of grocery shopping and cooking, but fewer than one in 10 women say their partners do most of these tasks.

PRIMARY FACTORS THAT DEFINE BEING A MAN IN TODAY'S SOCIETY



SOURCE: JWT Intelligence

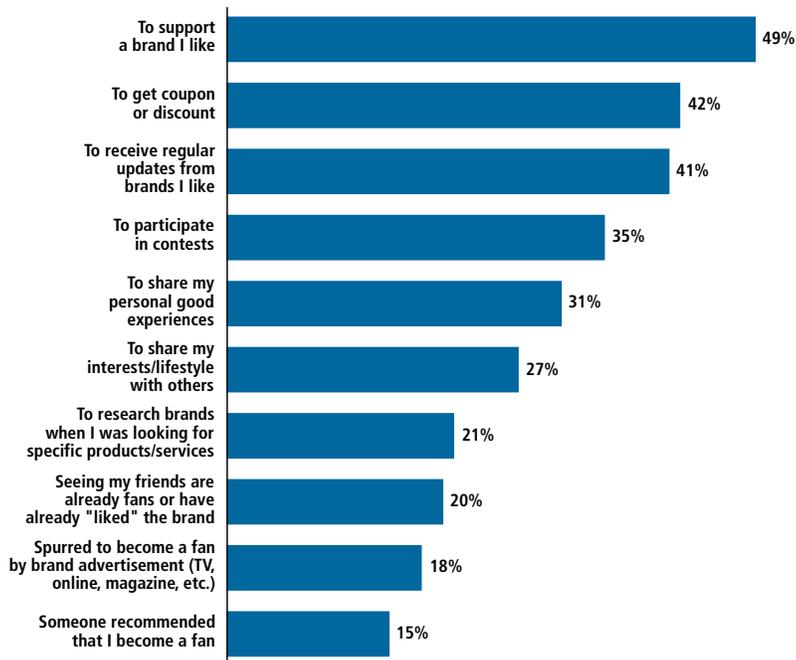
There is a similar gap between men and women's perceptions of men's parenting skills and participation. Almost nine in 10 men (87%) rate themselves an A or B in handling child care responsibilities, while 72% of women rate their partners that highly. Women are more likely to give their partners' parenting skills an A than men are to grade themselves that highly, however (31% of women vs. 23% of men). More than eight in 10 men (82%) believe that men face the same tough decisions about balancing career and family that women do; 63% of women agree. Two-thirds of men say they would choose to stay home with their children full-time if they could afford to do so. More than seven in 10 millennial men (72%) would take three months' paid paternity leave if their employers offered it. [MEN, FAMILY]

SOURCE: "The State of Men," June 2013, JWT Intelligence, Ann Mack, Director of Trendspotting, 466 Lexington Ave., New York, NY 10017; 212-210-7378; ann.mack@jwt.com; www.jwtintelligence.com. Price: Available online at no charge.

Most Fans of Brands on Facebook Are Already Customers

The majority of Facebook users (78%) who become "fans" of brands on the social network have already used the brands' products, according to Syncapse. Exceptions include

WHY FACEBOOK USERS 'LIKE' OR BECOME FANS OF BRANDS



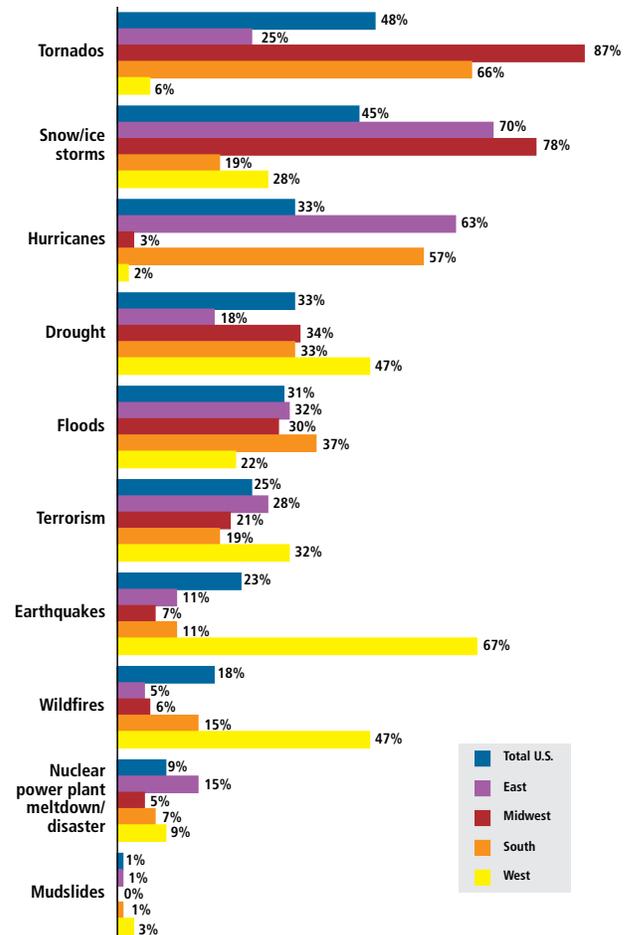
SOURCE: Syncapse

Continued on page 5

factoids

- Almost two-thirds of Americans (64%) would not want their children to pursue careers in politics. (*Gallup*; phone: 202-715-3030) [OPINION]
- The U.S. imported \$227 million in fireworks in 2012. (*CouponCabin.com*; phone: 866-732-9566) [HOLIDAYS]
- Women account for a larger share of U.S. video game players than boys under 18 do (31% vs. 19%). (*Entertainment Software Association*; phone: 202-223-2400) [VIDEO GAMES]
- Online groceries account for only 1% of the \$631 billion U.S. consumers spend on groceries annually. (*Fitch Ratings*; phone: 212-908-9123) [CONSUMER SPENDING & ATTITUDES]
- The majority of consumers expect retailers to respond to customer service issues posted on Twitter within two hours, but the average response time is 11 hours and 15 minutes. (*Conversocial*; phone: 646-237-6950) [SOCIAL NETWORKING]
- More than two-thirds of Facebook users (68%) are “lurkers” who rarely post on the site. (*Vision Critical*; phone: 604-647-1980) [SOCIAL NETWORKING]
- Americans consider Jeep to be the most patriotic brand, giving it a score of 98 out of 100. (*Brand Keys*; phone: 212-532-6028) [OPINION]
- Men tell an average of 1,092 lies per year; women tell 728. (*Men’s Health magazine*; phone: 610-967-5171) [HUMAN BEHAVIOR]
- Just over one in four Americans (26%) consider U.S. public schools to be good or excellent. (*Rasmussen Reports*; phone: 736-776-9777) [EDUCATION]
- Seven in 10 consumers (70%) open emails from brands whose products they already use. (*EmailOutbound Networks*; phone: 877-403-6245) [ADVERTISING/MARKETING]
- More than half of Americans (54%) say that bosses today expect people to work during vacations. (*Ricoh Americas Corp.*; phone: 973-882-2023) [WORKFORCE/EMPLOYMENT]
- Almost a third of Americans (31%) plan to work while on vacation this summer. (*BuyVia*; phone: 415-255-6507) [WORKFORCE/EMPLOYMENT]
- Americans’ favorite flavor of pie is apple (20% of men and 17% of women prefer it). (*DDB Communications*; phone: 212-415-2191) [FOOD/BEVERAGES]
- More than three-quarters of women (76%) wear makeup when going to the gym. (*Self magazine*; phone: 212-286-2860) [EXERCISE/FITNESS]
- Two-thirds of parents with children ages 9-12 (66%) say they spent more time in unstructured play as children than their kids do now. (*Materne*; phone: 212-675-7881) [FAMILY]
- Almost one in four teens ages 13-16 (24%) were able to purchase R-rated movie tickets in 2012, down from 33% in 2011. (*Federal Trade Commission*; phone: 202-326-3707) [YOUTH]
- More than one in 10 teens and young adults ages 13-23 (14%) admit to having hacked into another person’s email or social network account. (*McAfee*; phone: 408-346-5276) [YOUTH]
- U.S. consumers spent \$328.7 billion at Walmart in 2012. (*National Retail Federation*; phone: 202-783-7971) [RETAIL/SERVICE SECTOR]
- More than half of Americans (56%) have had viruses or malware on their computers. (*Imperium*; phone: 888-496-8008) [COMPUTERS/ELECTRONICS]
- Two-thirds of parents with children ages 2-12 say their kids have played with smartphones, tablets, or other connected devices intended for adults. (*NPD Group*; phone: 516-625-0700) [FAMILY]

DISASTERS AMERICANS BELIEVE ARE MOST LIKELY TO AFFECT THEM, BY REGION OF COUNTRY



SOURCE: Harris Interactive, 60 Corporate Woods, Rochester, NY 14623; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com

Fans of Brands

Continued from page 3

brands that are prohibitively expensive for many users but are aspirational, such as BMW (only 36% of fans have purchased the brand's vehicles).

Facebook users' top reasons for becoming fans or "liking" a brand on the site are showing support for the company and becoming eligible for coupons or discounts. [SOCIAL NETWORKING, ADVERTISING/MARKETING]

SOURCE: "Why Consumers Become Brand Fans," June 2013, Syncapse, Max Kalehoff, VP Product Marketing, 7 W. 22nd St., 7th Fl., New York, NY 10010; 212-798-1414; www.syncapse.com. Price: Available online at no charge.

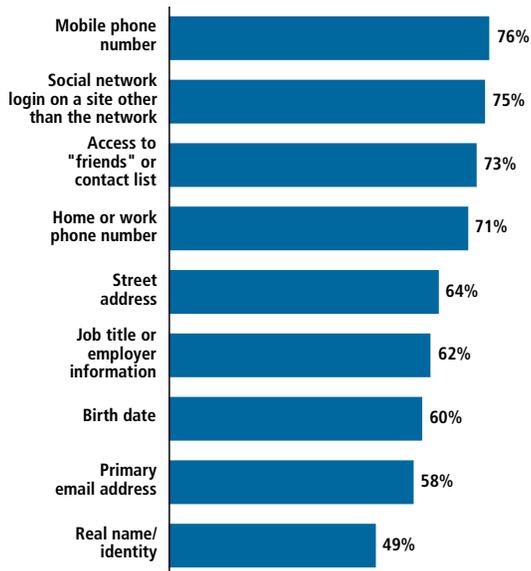
Most Consumers Falsify or Withhold Personal Data Online

More than nine in 10 Internet users (92%) withhold and/or falsify at least some personal data when filling out forms online (such as when registering on websites or mobile apps), according to Customer Commons. Of all types of personal information requested by websites, consumers are most likely to avoid giving out their mobile phone numbers and access to their friend lists or contacts. Almost half decline to give out their real names.

More than two-thirds of Internet users (68%)

TYPES OF INFORMATION CONSUMERS AVOID GIVING OUT ON WEBSITES

(% who have ever avoided giving this information out when filling out forms)



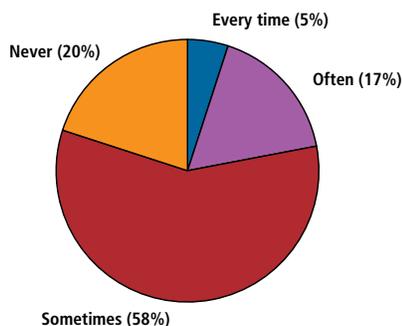
SOURCE: Customer Commons

have left some or all of the information fields in online forms blank to avoid giving out their personal information. Consumers' top reasons for giving false or incomplete information on websites or mobile apps are feeling that the company didn't really need the information, being concerned about what they would do with the information, and not being familiar with the site or app. [ONLINE, HUMAN BEHAVIOR]

Nine in 10 Internet users withhold or falsify data when filling out online forms.

HOW OFTEN INTERNET USERS WITHHOLD PERSONAL INFORMATION WHEN USING WEBSITES

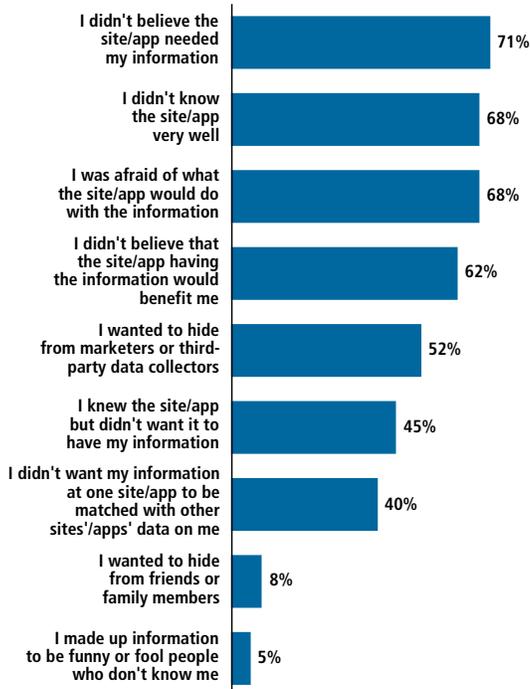
(Includes not giving all requested information and/or giving false information)



SOURCE: Customer Commons

WHY CONSUMERS HAVE AVOIDED GIVING OUT PERSONAL INFORMATION ON WEBSITES OR APPS

(Among those who have ever withheld information or given false information)



SOURCE: Customer Commons

SOURCE: "Lying and Hiding in the Name of Privacy," 2013, Customer Commons, Mary Hodder, Author, 510-701-1975; hodder@gmail.com, customercommons.org/research/. Price: Available online at no charge.

Cross-platform viewers ages 18-34 watch 24.6 hours of TV per week.

Cable TV

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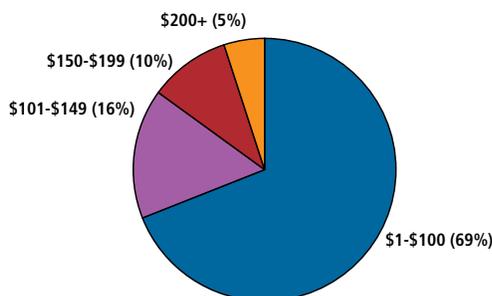
to multichannel TV service cite missing their favorite shows (44%), wanting to be able to watch the current season of favorite shows (38%), and improved finances as the top reasons.

Three-quarters of online-only viewers who do not plan to subscribe to multichannel service consider pay TV to be too expensive or not a good value (75%), and 52% say they can't afford it. Almost half say it's easy to find the shows they want to watch through websites, apps, or services (47%), and 46% say they can get what they want from free streaming.

Netflix is the streaming service most widely used by 18-to-34-year-olds. Half (50%) turn to it first, and it's almost equally popular among cross-platform viewers (49%) and online-only viewers (53%).

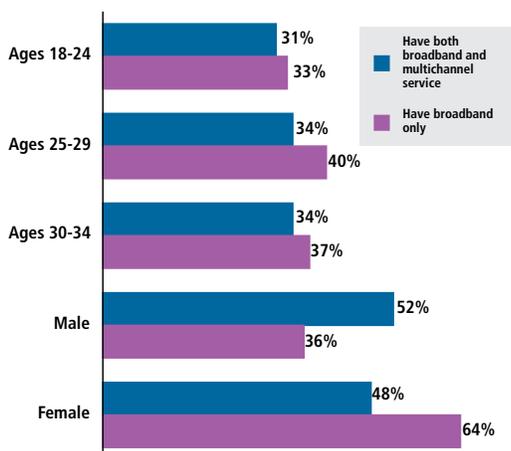
Cross-platform viewers 18-34 (who have both broadband and multichannel TV service) watch an average of 24.6 hours per week, compared to 17 hours per week among those who watch TV only online.

HOW MUCH CURRENT PAY-TV SUBSCRIBERS PAY PER MONTH FOR TV SERVICE



SOURCE: CouponCabin.com

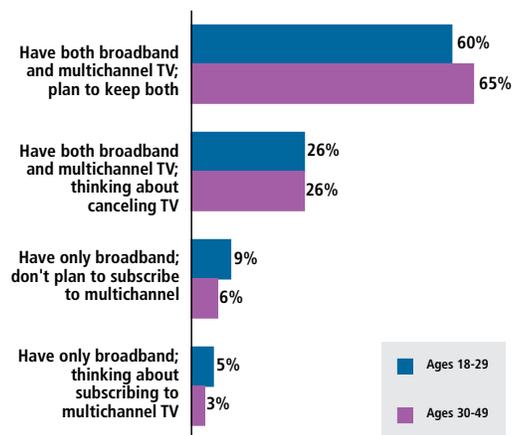
DEMOGRAPHIC PROFILES OF ONLINE-ONLY VS. CROSS-PLATFORM TV VIEWERS AGES 18-34



SOURCE: Pivot

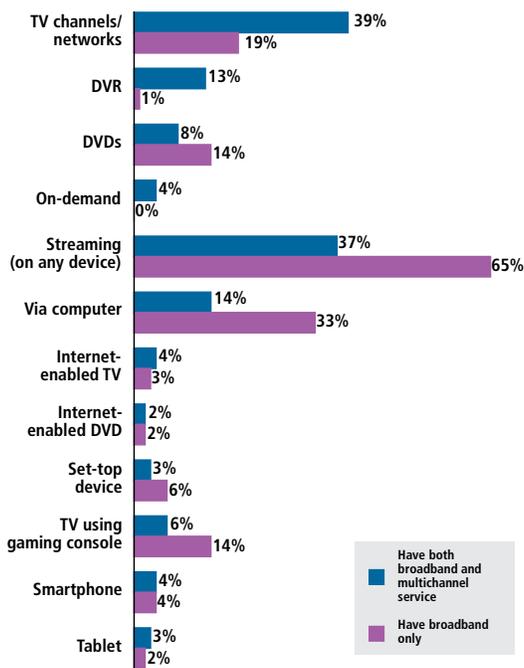
Those who watch TV online only are more likely than cross-platform viewers to be female and less likely to be employed full-time. They also have lower average incomes than cross-platform viewers. [TELEVISION, DIGITAL LIFE]

CURRENT AND PLANNED TV SUBSCRIPTIONS AMONG BROADBAND USERS, BY AGE



SOURCE: Pivot

HOW 18-TO-34-YEAR-OLDS WATCH VIDEO AND TV CONTENT IN A TYPICAL WEEK



SOURCE: Pivot

SOURCES: "Broadbanders 2013, Spotlight: Adults 18-34," June 2013, Pivot, Karen Ramspacher, SVP Research & Insights, 331 Foothill Rd., 3rd Fl., Beverly Hills, CA 90210; 310-550-5100; info@participantproductions.com; www.pivot.tv. Price: Available online at no charge.

CouponCabin.com, June 2013, Jackie Warrick, Senior Savings Adviser, 1319 119th St., 2nd Fl., Whiting, IN 46394; 866-732-9566; bizdev@couponcabin.com; www.couponcabin.com. Price: Contact for information.

More Women Than Men Watch Online Video Ads

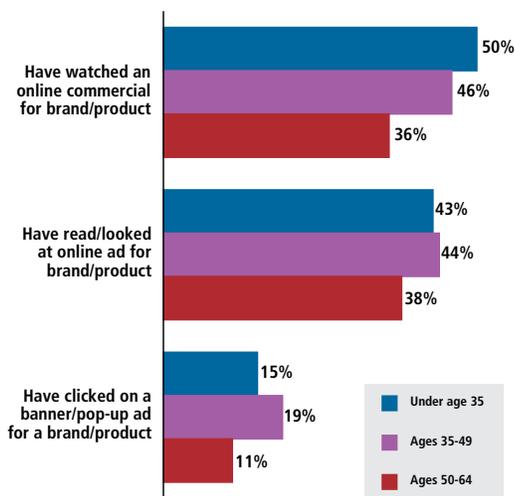
Women are more likely than men to watch video ads online, according to Ipsos. More than half of U.S. women (51%) have watched online commercials in the past month, compared to 38% of men who have done so. Similarly, 48% of women have looked at or read online ads in the past month, compared to 36% of men who have done so. Men and women are equally likely to have clicked on banner or pop-up ads during the past month (15% of men and 15% of women have done so).

Adults under age 50 are more receptive than those 50 and older to all forms of online advertising. Interest in online ads generally rises with income, though middle-income adults are more likely than those with either low or high household incomes to click on banners or pop-ups.

When asked why they pay attention to or click on online ads or promotional videos, the top reasons are interest in the product or the ad content and being forced to sit through the ad to get to a desired screen or content. Women are more likely than men to look at ads because they're blocking access to a desired screen or because the ad is for a product they're already shopping for. Men are more likely to look at ads because they're from a company they like, because the ad has good cinematography or special effects, or because it includes attractive people or appealing celebrities.

Adults under age 35 are significantly more likely than older adults to pay attention to ads because friends alerted them to the ad. People

HOW U.S. ADULTS HAVE RESPONDED TO ONLINE ADS IN PAST 30 DAYS, BY AGE

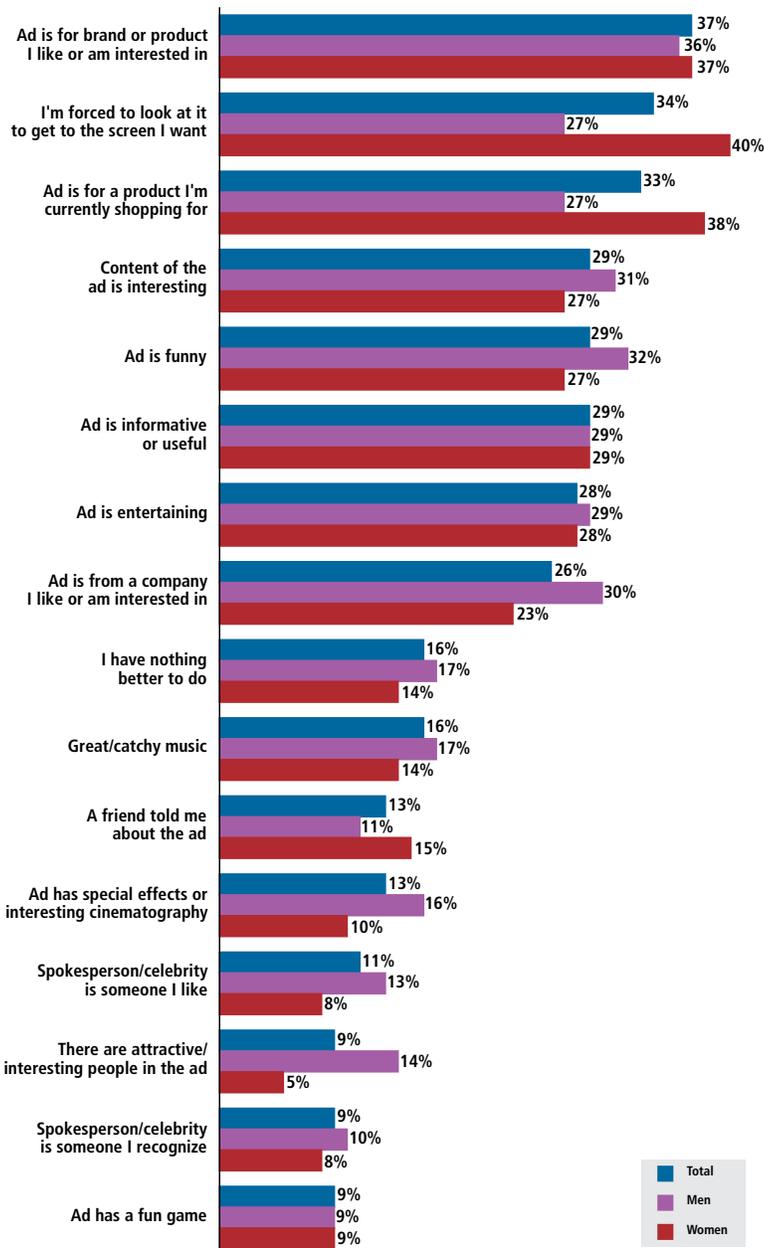


SOURCE: Ipsos

age 50 and older are more likely than younger adults to pay attention because of a pre-existing interest in the product or brand being advertised. The study also includes country-by-country comparisons, as well as data on online ad responses by income, education, and marital status. [ADVERTISING/MARKETING, ONLINE]

WHY MEN AND WOMEN PAY ATTENTION TO/CLICK ON ONLINE ADS

(Among those who have watched, read, and/or clicked on online ads in the past 30 days)



SOURCE: Ipsos

SOURCE: "Socialogue: A-TENNNN-SHUN," July 2013, Ipsos, Jill Wiltfong, SVP Marketing, Ipsos Open Thinking Exchange, 10567 Jefferson Blvd., Culver City, CA 90232; 310-736-3440; jill.wiltfong@ipsos.com; www.ipsos-na.com.

focus on emerging majorities

Hispanic Households Are More Likely Than Others to Use Online Video

Hispanic households are more likely than U.S. households overall to use streaming or downloaded video and audio, including both free and subscription services, according to Centris. A third of Hispanic households (33%) subscribe to Netflix, compared to 25% of U.S. households overall. A quarter of Hispanic households (25%) subscribe to other video subscription services, compared to 16% of households overall.

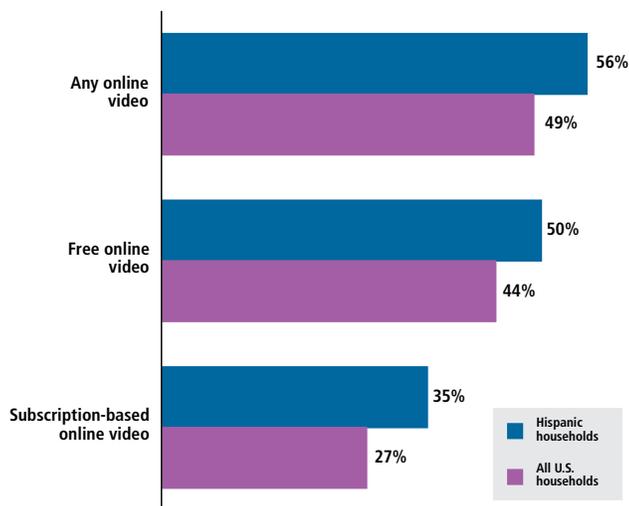
Hispanic households (82%) are slightly less likely than overall households (87%) to subscribe to pay-TV services (cable, satellite, or telecom). They're slightly more likely to subscribe to premium channels, however (52% of Hispanic households vs. 48% of overall households). Hispanic households are twice as likely as households overall to have used pay-per-view TV services in the past 30 days (10% vs. 5%).

Among households that do not subscribe to pay-TV services, 74% of Hispanic households and 64% of overall households watch over-the-air (broadcast) TV. Almost six in 10 Hispanic households (59%) that do not subscribe to pay-TV services have used over-the-top TV services (e.g., streaming or downloaded video) in the past 30 days, as have 52% of overall households that don't subscribe to pay TV.

Hispanics are less likely than overall households to have either broadband Internet (61% vs. 70%) or Internet access in general (67% vs. 71%). Given their lower level of home Internet access, it's especially striking that Hispanic households are more likely than overall households to watch online video on set-top boxes.

Hispanic households are more likely than overall

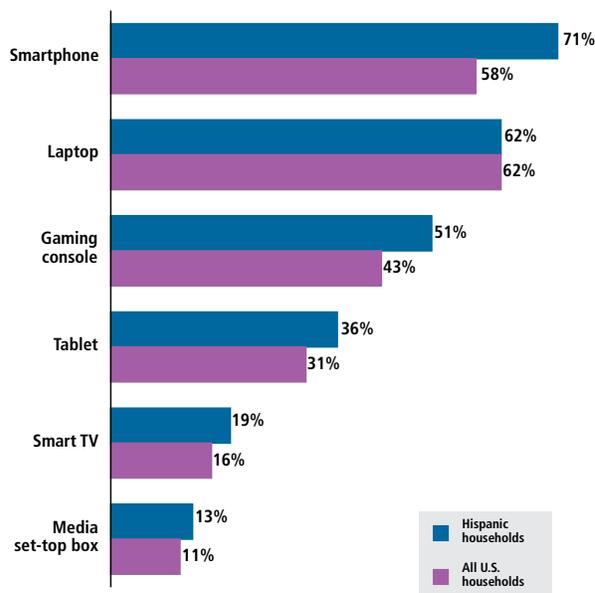
VIEWING OF ONLINE OVER-THE-TOP VIDEO IN PAST 30 DAYS, HISPANIC HOUSEHOLDS VS. OVERALL HOUSEHOLDS



SOURCE: Centris

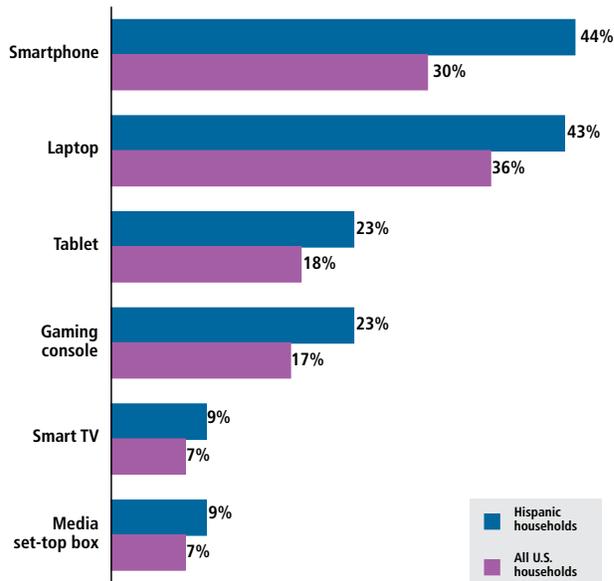
households to own smartphones, gaming consoles, and tablets. They're also more likely than the average household to use laptops, mobile devices, and consoles for watching video. [EMERGING MAJORITIES, ENTERTAINMENT]

OWNERSHIP OF SELECTED DEVICES, HISPANIC HOUSEHOLDS VS. OVERALL HOUSEHOLDS



SOURCE: Centris

DEVICES USED IN PAST 30 DAYS FOR VIEWING VIDEO



SOURCE: Centris

SOURCE: "U.S. Communication & Entertainment Insights Program: Hispanic Households," June 2013, Denise Bogan, Senior Director, Business Development, 755 Business Center Dr., Horsham, PA 19044; 267-558-3177; dbogan@centris.com; www.centris.com. Price: Contact for information.

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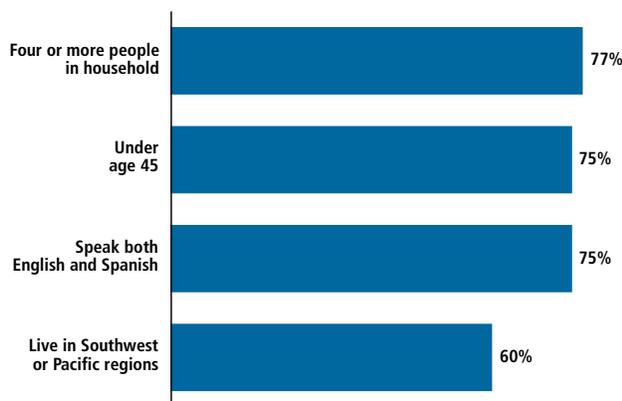
focus on emerging majorities *Continued from page 8*

Three in 10 Hispanics Are Upscale

Almost one in three Hispanic households (29%) are “upscale”—earning \$50,000-\$100,000 annually—according to Nielsen and the Association of Hispanic Advertising Agencies (AHAA). In 2012, 15 million U.S. Hispanics were in this income bracket; this number is expected to double by 2050.

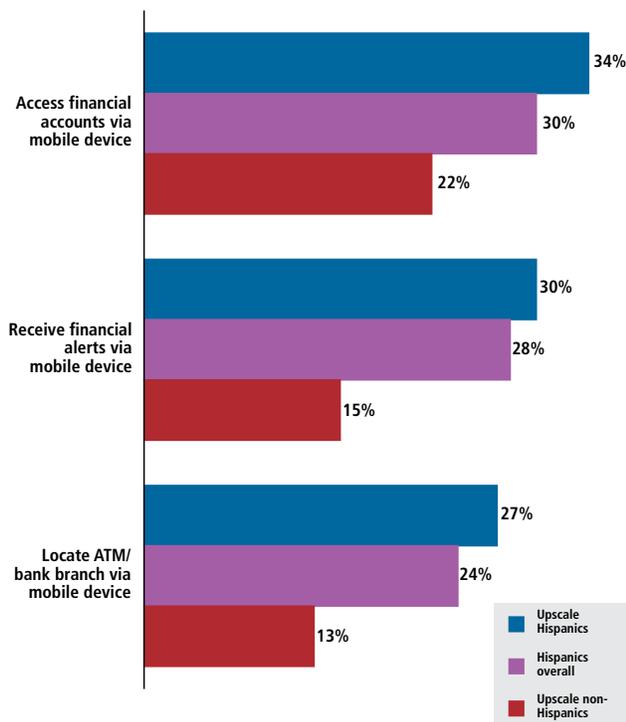
These households account for 37% of all spending by Hispanics. They are younger than non-Hispanic whites in the same income bracket—an average age of 33, versus

DEMOGRAPHIC PROFILE OF UPSCALE LATINOS
(With annual household income of \$50,000-\$100,000)



SOURCES: Nielsen and Association of Hispanic Advertising Agencies

USE OF MOBILE DEVICES TO MANAGE FINANCIAL ACCOUNTS



SOURCES: Nielsen and Association of Hispanic Advertising Agencies

39 among white non-Hispanics. Most live in urban areas, especially Los Angeles, New York City, Houston, and Miami. They tend to have larger households than non-Hispanic whites with similar incomes; 85% live in households with three people or more, compared with 65% of non-Hispanics.

More than half have college degrees, and they’re more likely than non-Hispanics with similar incomes to be business owners. Almost nine in 10 upscale Hispanics have savings accounts (86%) and half have investments. They’re more likely than overall Hispanics to invest in mutual funds (21% vs. 16%). They’re more likely than non-Hispanics with comparable incomes to manage their financial accounts from mobile devices.

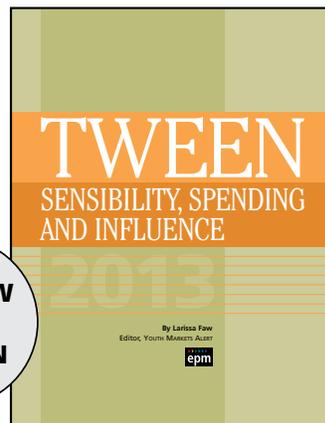
They outspend both Hispanics overall and non-Hispanics with comparable incomes on health and beauty products, including hair care products, fragrance, cosmetics, and men’s toiletries.

They are bicultural media users; their TV viewing is split almost evenly (52% of programs they watch are in Spanish, 48% in English). They prefer to watch comedies, documentaries, and children’s programs in English and cultural events, concerts, and sports in Spanish. [EMERGING MAJORITIES, FINANCE]

SOURCES: “Upscale Latinos: America’s New Baby Boomers,” June 2013, Nielsen and the Association of Hispanic Advertising Agencies (AHAA). Nielsen, Meg Chari, Communications Analyst, Consumer Packaged Goods and Retail, 85 Broad St., New York, NY 10004; 800-864-1224; meg.chari@nielsen.com; www.nielsen.com.

Association of Hispanic Advertising Agencies (AHAA), Kristy Cartier, Marketing & Media, 8400 Westpark Dr., 2nd Fl., McLean, VA 22102; 703-610-9014; kcartier@ahaa.org; www.ahaa.org. Price: Contact for information.

Tweens are impulsive, eager to spend, and within your reach.



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spotlight on millennial moms

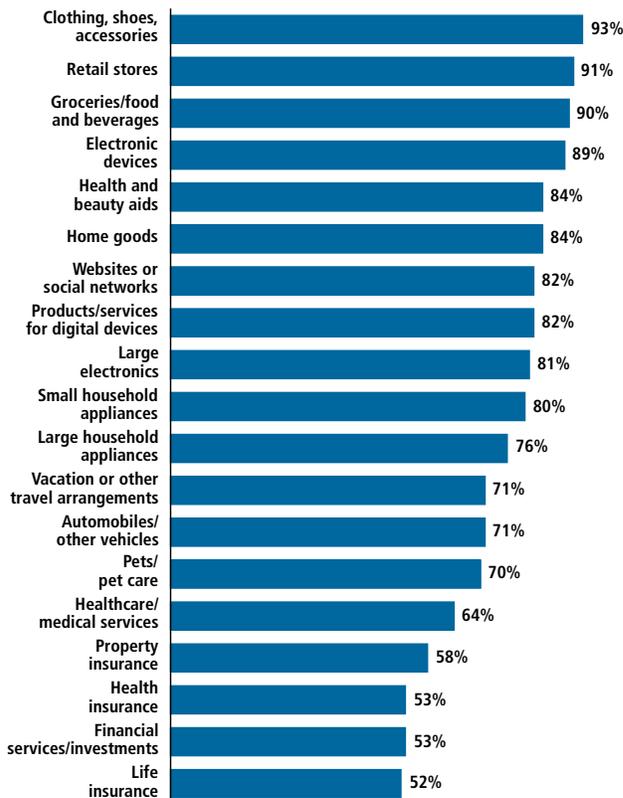
Millennial Moms Recommend Products Online More Often Than Other Moms

Millennial moms (those born 1978-1994) “like” or recommend products or services online an average of 10.4 times per month, compared to an average of 7.7 times per month among moms overall, according to Weber Shandwick and KRC Research. Millennial moms retweet or repin products or services 7.8 times per month; moms overall retweet or repin 5.4 times per month. Millennial moms also get asked for product recommendations more frequently than other moms—an average of 9.6 times per month vs. 6.3 times among moms overall.

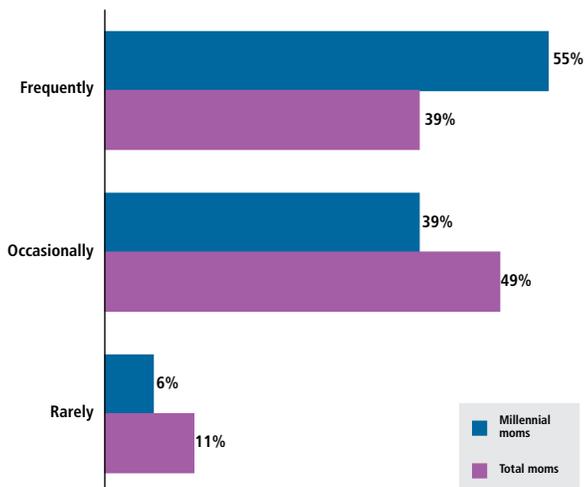
Almost three-quarters of millennial moms (74%) believe others ask for their advice (on a range of topics) more

frequently than they ask other friends. Millennial moms have an average of 24 close friends, compared to an

TYPES OF PRODUCT INFORMATION
MILLENNIAL MOMS SHARE FREQUENTLY



HOW OFTEN PEOPLE SEEK MOMS' ADVICE ON PURCHASE DECISIONS



SOURCES: Weber Shandwick and KRC Research

SOURCES: Weber Shandwick and KRC Research

Continued on page 10

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spotlight on millennial moms *Continued from page 10*

average of 22 among moms overall. Millennial moms are more likely than other moms to share information about clothing, health and beauty aids, home goods, websites and social networks, financial services and life insurance, and products or services for digital devices.

Millennial moms are twice as likely as moms overall to be single/never married/not cohabiting (32% vs. 16%). One in three millennial moms (33%) are their household's primary financial provider, compared with 26% of moms overall.

Millennial moms are almost equally likely to be full-time workers (30%) or homemakers (35%). Millennial moms are more likely than moms overall to make grocery purchase

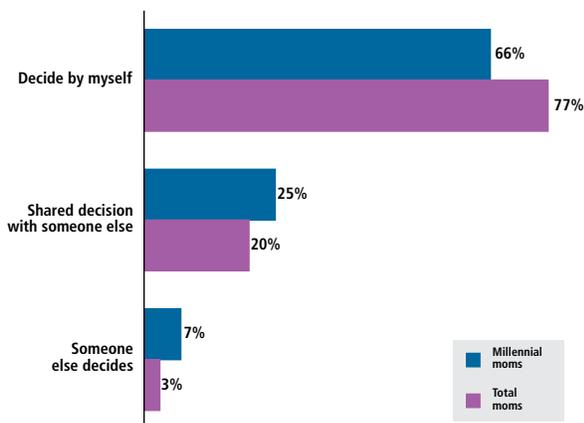
decisions jointly with someone else in their household.

Many millennial moms feel misunderstood or overlooked by marketing; 42% say "most advertising and marketing is not geared toward women like me," compared with 36% of moms overall who feel this way.

SOURCES: "Digital Women Influencers: Millennial Moms," June 2013, Weber Shandwick and KRC Research. Weber Shandwick, Leslie Gaines-Ross, Chief Reputation Strategist, 919 Third Ave., New York, NY 10022; 212-445-8000; lgaines-ross@webershandwick.com; www.webershandwick.com. Price: Available online at no charge.

KRC Research, Bradley Honan, CEO, 919 Third Ave., New York, NY 10022; 212-537-8743; bhonan@krcresearch.com; www.krcresearch.com.

WHO MAKES MOST DECISIONS ABOUT FOOD/BEVERAGE PURCHASES



SOURCES: Weber Shandwick and KRC Research

free for all *Continued from page 12*

and are living without a partner, while 7% are married but living apart.

Compared to married fathers living with their spouses, single dads have lower household incomes, but they have higher incomes than single moms do. Single fathers are less likely than married fathers to be white and more likely to be black or Hispanic. Men under 30 are more likely than older men to be single dads. Men under 30 make up 30% of single dads living with partners but only 10% of those living without partners. Single fathers who live with partners tend to be younger, less affluent, and less educated than those living without partners. [FAMILY, MEN]

SOURCE: "The Rise of Single Fathers: A Ninefold Increase Since 1960," July 2013, Pew Research Center, Gretchen Livingston, Senior Researcher, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4300; info@pewresearch.org; www.pewresearch.org.

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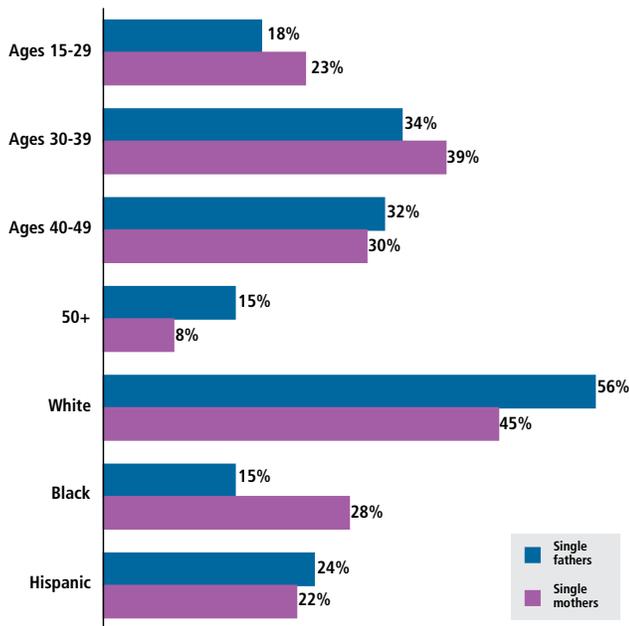
Single Dads Head Almost One in 10 Households With Children

Single fathers head almost one in 10 households with children under 18 (8%), the highest proportion ever recorded, according to the Pew Research Center. In 2011, single dads headed more than 2.6 million households, up from just 297,000 in 1960. In 2011, dads represented 24% of single parents, up from 14% in 1960. Single dads are much more likely than single moms to be cohabiting with

a partner (41% of dads vs. 16% of moms). Just over half of single dads (52%) are divorced, widowed, or never married

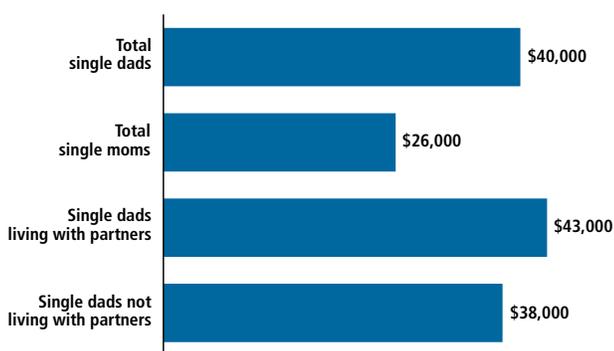
SINGLE DADS VS. SINGLE MOMS, BY AGE AND RACE/ETHNICITY

(% of single dads and moms who fall into each category)



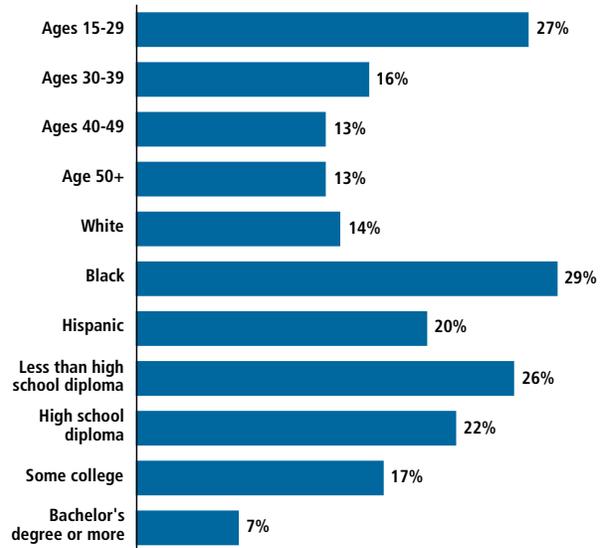
SOURCE: Pew Research Center

ANNUAL MEDIAN HOUSEHOLD INCOMES OF SINGLE DADS AND SINGLE MOMS



SOURCE: Pew Research Center

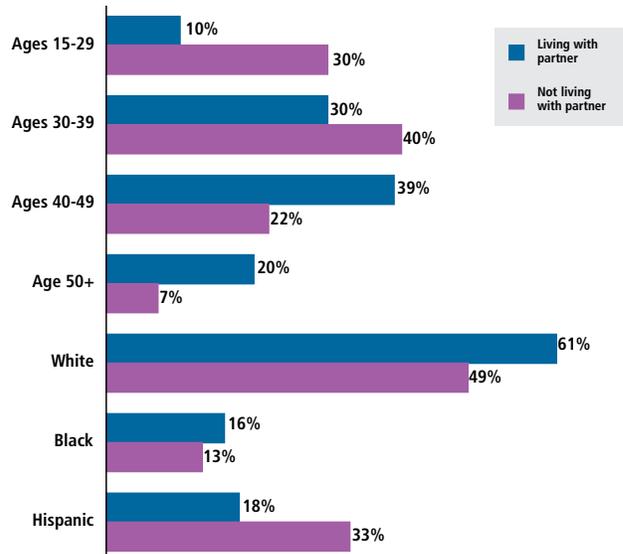
SINGLE FATHERS AS PROPORTION OF OVERALL FATHERS, BY AGE, RACE/ETHNICITY, AND EDUCATION



NOTE: Includes fathers who are married but do not live with their spouses and unmarried fathers cohabiting with partners.

SOURCE: Pew Research Center

SINGLE FATHERS LIVING WITH AND WITHOUT PARTNERS, BY AGE AND RACE/ETHNICITY



SOURCE: Pew Research Center

Continued on page 11

Apps & e-properties: hype or opportunity?

THE MARKET FOR APPS & E-PROPERTIES

The killer app to date, literally and figuratively, is *Angry Birds*. That “simple” game has spawned an industry unto itself. Sequels. Movie tie-ins. Short-form videos. Licensed toys, t-shirts, headphones, and lunch boxes.

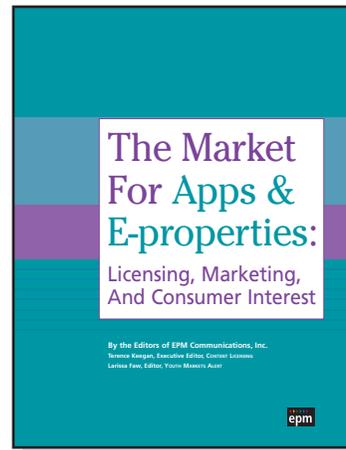
What’s next, though? Not just among apps, but across the spectrum of digital properties. And how can you filter out the hype to focus on the opportunities?

The Market For Apps & E-properties demonstrates how, why, and when to add apps, social media, virtual worlds, mobile content, and other digital properties to your marketing and licensing mix.

This report focuses on four key areas:

- ▶ Putting the world of digital properties in a market context;
- ▶ The app marketing and licensing picture;
- ▶ Consumer data on app, social media, mobile, publishing, and entertainment use, as well as promotional activity;
- ▶ Kids and apps.

Use the data and analysis in **The Market For Apps & E-properties** to help you decide what’s hype and what’s not, and identify profitable digital opportunities that are right for you.



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- ▶ Licensing programs for Apple’s top 25 all-time best-selling apps
- ▶ Profiles of app developers with content publishing experience
- ▶ How much online retailers are investing in mobile and app technology
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- ▶ Activities Americans engage in on tablets and smartphones while watching TV
- ▶ How much parents will pay for apps for their kids

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KIDS & APPS

LICENSING PROFILES FOR APPLE'S TOP 25 ALL-TIME BEST-SELLING APPS

PROPERTY	GAME	PROVIDER	PROVIDER TYPE	MARKETING/ADVERTISING	REVENUE/PROFITABILITY
Angry Birds	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Seasons	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Rio	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Friends	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Space	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Star Wars	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Star Wars 2	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Go!	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Epic	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Blast	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Friends	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Star Wars	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Star Wars 2	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Go!	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Epic	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.
Angry Birds Blast	Game	Rovio Mobile	App	App Store	Highly profitable, licensed toys, t-shirts, headphones, and lunch boxes.

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Text is Top Use for Mobile, But Apps Growing

The Internet is an Ever-More Social, Mobile, and Entertainment-Oriented Medium

HOW MANY APPS ARE INSTALLED ON EACH DEVICE?

Device	Number of Apps
Smartphone	100
Tablet	50
Smart TV	20
Smartwatch	10

HOW MANY APPS ARE INSTALLED ON EACH DEVICE BY AGE?

Age Group	Smartphone	Tablet	Smart TV	Smartwatch
18-24	120	60	30	15
25-34	110	55	25	12
35-44	100	50	20	10
45-54	90	45	15	8
55-64	80	40	10	5
65+	70	35	5	2

Learn how to leverage apps and e-properties to appeal to kids.

Identify new business opportunities based on consumer data from 36 sources.

THE MARKET FOR APPS & E-PROPERTIES

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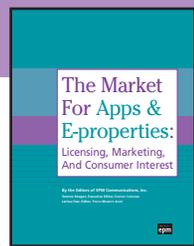
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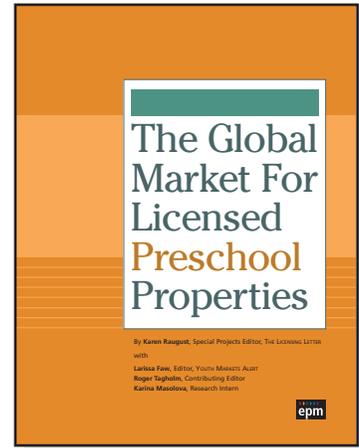
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- ▶ What percent of preschool merchandise sold is toys, apparel, and other categories?
- ▶ The five properties licensing executives predict will be "hot" in 2013?
- ▶ How to motivate moms through packaging and marketing messages?
- ▶ Global variations in merchandising for licensed preschool properties?

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- Dora the Explorer
- Fancy Nancy
- Fifi and the Flowertots
- Galinha Pintadinha
- The Hive
- Ladybug Girl
- Masha and the Bear
- Miffy
- Peppa Pig
- Pocoyo
- Postman Pat
- Rastamouse
- Sesame Street
- Strawberry Shortcake
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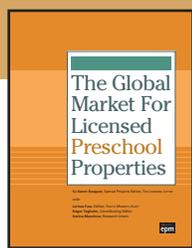
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