

Press Release



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GROUND-BREAKING STUDY OF VIDEO VIEWING FINDS YOUNGER BOOMERS CONSUME MORE VIDEO MEDIA THAN ANY OTHER GROUP

Traditional Television Remains “800 Pound Gorilla” In Video Media Arena

NEW YORK, NY – March 26, 2009 – A pioneering study conducted on behalf of the Nielsen-funded Council for Research Excellence (CRE) by Ball State University's Center for Media Design (CMD) and Sequent Partners dispels several popular notions about video media use, finding that younger baby boomers (age 45-54) consume the most video media while confirming that traditional "live" television remains the proverbial "800 pound gorilla" in the video media arena. (See appendix for more detail.)

Results of the \$3.5 million year-long Video Consumer Mapping (VCM) study, in which participants were directly observed throughout the day by CMD researchers, were released to the media industry today by representatives of the CRE, Nielsen, Ball State and the analytical firm Sequent.

Using handheld smart keyboards equipped with a custom media collector program developed by Ball State, the observers recorded — in 10-second increments — consumer exposure to visual content presented on any of four categories of screens: traditional television (including live TV as well as DVD/VCR and DVR playback); computer (including Web use, e-mail, instant messaging and stored or streaming video); mobile devices such as a BlackBerry or iPhone (including Web use, text messaging and mobile video); and "all other screens" (including display screens in out-of-home environments, in-cinema movies and other messaging and even GPS navigation units).

All told, the VCM study generated data covering more than three-quarters of a million minutes or a total of 952 observed days. This is the largest and most extensive observational study of media usage ever conducted.

Key findings

In addition to the revelation that consumers in the 45-54 age group average the most daily screen time (just over 9 1/2 hours), the VCM study found the average for all other age groups to be "strikingly similar" at roughly 8 1/2 hours — although the composition and duration of devices used by the respective groups throughout the day varied.

The research also found that:

- Contrary to some recent popular media coverage suggesting that more Americans are rediscovering "free TV" via the Internet, computer video tends to be quite small with an average time of just two minutes (a little more than 0.5 percent) a day.
- Despite the proliferation of computers, video-capable mobile phones and similar devices, TV in the home still commands the greatest amount of viewing, even among those ages 18-24. Thus, in the eyes of the researchers, this appears to dispute a common belief that Internet video and mobile phone video exposure among that group (and the next one up, age 25-34) were significant in 2008.

- Even in major metropolitan areas where commute times can be long and drive-time radio remains popular, computer use has replaced radio as the No. 2 media activity. Radio is now No. 3 and print media fourth.
- TV users were exposed to, on average, 72 minutes per day of TV ads and promos — again dispelling a commonly held belief that modern consumers are channel-hopping or otherwise avoiding most of the advertising in the programming they view.
- Early DVR owners spent much more time with DVR playback than newer DVR owners. At the same time, DVR playback was even more likely than live TV to be the sole medium.
- "Environmental" exposure outside the home, while still relatively small at just 2.8 percent of total video consumption today, could nearly double during the next few years. Currently, measurement of these screens is only just beginning with programs such as Nielsen On-Location Media and Nielsen Online, though they may be given more importance soon given their growing and strategic advertising role.

For more highlights of the report, please visit <http://www.researchexcellence.com/news/vcmstudy.html>

Detail makes the difference

"This landmark research study makes a significant contribution to our understanding of how consumers go about accessing content across all platforms within the context of their daily lives," said CRE Media Consumption and Engagement Committee Chair, Shari Anne Brill. "It also considerably advances the Council's thinking regarding audience measurement priorities. Nothing of this magnitude has ever been attempted before and we expect that our entire industry will benefit from this game-changing work for years to come."

Mike Hess, CRE Chair, added, "The scope of the study was too big and the cost too prohibitive for any one company to undertake on its own. A project of this magnitude clearly required a group effort. In addition to the compelling findings of the study, I am proud of the way CRE members from more than 35 different industry organizations collaborated as an independent council to generate today's groundbreaking learning."

"What differentiates this study from all other attempts to measure video exposure at the consumer level is its scale, the range of media covered and the fact that it is focused on consumers first and the media second. It's not a study about TV or the Web or any other medium – it's about how, where, how often and for how long consumers are exposed to all media," said Mike Bloxham, director of insight and research for Ball State's CMD, which was selected to lead the project, in large part, because of its previous success with the influential Middletown Media Studies I and II.

An important finding of those earlier efforts, Bloxham explained, concerned the uncertainty of more historical methods of measurement and, in particular, various forms of self-report.

"Among the things we learned from those experiences is that people generally cannot report accurately how much time they spend with media," said Bloxham. "Some media tend to be over-reported whereas others tend to be under-reported – sometimes to an alarming extent. Clearly, that kind of variance puts in question one's ability to draw meaningful conclusions, and it convinced us that the observational method is the only real way to achieve accurate and reliable results."

Added Paul Donato, Nielsen's Chief Research Officer, "These new results are consistent with previous Nielsen studies that have found that video consumption has never been higher and that television continues to dominate the media landscape. Nielsen applauds the CRE, CMD and Sequent for conducting this research, which will help us make more informed decisions on how to measure media consumption."

About the Council for Research Excellence

The Council for Research Excellence (CRE) is an independent research group created by the Nielsen Company and comprised of senior-level industry researchers representing advertisers, agencies, broadcast networks, cable, syndicators, local stations, and industry associations. The CRE is dedicated to advancing the knowledge and practice of audience measurement methodology. For more information on the Council for Research Excellence, please visit: www.researchexcellence.com

About The Nielsen Company

The Nielsen Company is a global information and media company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and business publications (Billboard, The Hollywood Reporter, Adweek). The privately held company is active in approximately 100 countries, with headquarters in New York, USA. For more information, please visit: www.nielsen.com.

About Ball State University and the Center for Media Design

Ball State University, located in Muncie, Ind., is the third-largest public university in Indiana, with a total enrollment of nearly 20,000 students. It offers approximately 180 undergraduate majors and pre-professional programs, and more than 100 master's and doctoral degrees.

The Center for Media Design (CMD) is a research and development facility focused on the creation, testing and practical application of digital technologies for business, classroom, home and community. Last year, CMD published Middletown Media Studies II (MMS2), a unique observational study of people's exposure to 15 different media and 17 different life activities in an average day – all recorded in 15-second increments. For more information please visit: <http://cms.bsu.edu/Academics/CentersandInstitutes/CMD.aspx>.

About Sequent Partners LLC

Sequent Partners is a brand and media metrics consultancy helping leading advertiser, media, and research companies through this accelerating transition in media to ultimately build brand value. The firm has worked with Ball State University since the Middletown Media Studies and has most recently founded Media Behavior Institute to commercialize BSU's observational research method. For more information, please visit: www.sequentpartners.com

Appendix
Video Consumer Mapping Study
Average Daily Minutes of Media Consumption: Means Including Zero
Spring and Fall 2008*

Media	Total Adults 18+	18-24	25-34	35-44	45-54	55-64	65+
Live TV	309.1	209.9	256.0	230.4	335.7	346.1	420.5
Playback TV via DVR/TiVo	14.6	17.2	15.9	17.2	19.4	8.5	7.2
DVD or VCR	22.9	34.0	35.4	27.4	20.6	14.0	11.4
Console Games	6.5	25.9	13.9	4.9	3.0	1.2	0.3
Television Total	353.1	287.0	321.2	279.9	378.7	369.7	439.4
Any Web	48.8	67.0	55.7	74.1	46.0	41.7	19.2
Email	37.4	20.3	45.1	46.5	51.4	37.8	11.1
IM	7.9	14.8	2.9	14.6	15.1	0.0	0.3
Any Software	46.1	61.8	50.3	61.6	52.1	35.8	15.6
Computer Video	2.4	5.5	4.3	2.6	2.0	1.2	0.2
Computer Total	142.5	169.5	158.3	199.3	166.4	116.5	46.5
Mobile Talk	16.6	29.1	19.0	24.7	17.8	12.3	3.1
Mobile Text/Multimedia Messaging	2.2	11.6	2.2	2.1	1.3	0.4	0.1
Mobile Web	0.9	0.8	2.3	0.6	0.7	1.3	0.0
Mobile Other (Video, Camera, Games, etc.)	0.5	1.1	0.6	0.6	0.5	0.2	0.1
Mobile Video	0.1	0.1	0.0	0.1	0.1	0.0	0.0
Mobile Total	20.2	42.8	24.0	28.0	20.5	14.2	3.2
Environmental/Other Video	4.4	9.2	4.9	2.6	4.8	4.1	3.6
In-Cinema Movie	1.8	1.2	1.6	3.1	0.6	3.0	2.0
GPS Navigation	2.0	0.0	1.2	0.3	2.6	4.1	3.8
Other Total	8.2	10.4	7.6	5.9	8.0	11.1	9.4
Total	524.0	509.7	511.1	513.1	573.6	511.5	498.5

*The significance levels for all data shown in this document are covered in the full report