



A Voice In the West

THE TV ISSUE – 2nd Quarter 2009

On March 26, 2009, The Council for Research Excellence (CRE) released their Video Consumer Mapping (VCM) study, in which participants were directly observed throughout the day by Ball State University's Center for Media Design researchers. This \$3.5 million year-long study was funded by The Nielsen Company and the results confirm that traditional "live" television remains the proverbial "800 pound gorilla" in the video media arena. In light of these new findings, this issue will be dedicated to the strength of Television.

TV is Still a Prevalent & Influential Medium

According to the most recent release from the Council for Research Excellence...

- 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%) 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.

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- 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.

Council for Research Excellence Press Release, March 26, 2009. For more highlights of the report, please visit www.researchexcellence.com/vcmstudy.html

Study: Viewers Turn to Local TV News in Tough Times

Mediaweek, April 5, 2009 (portion of the text reprinted)



When times are tough, people turn more often to local TV for news. According to a new study by Frank N. Magid Associates for Hearst-Argyle Television, 99 percent of respondents said they are turning to local TV news at least as much as or more frequently than in the past due to the troubled economy.

Conducted over two weeks in February, the study surveyed 2,500 TV news viewers in Hearst-Argyle's 24 TV markets including Boston, Baltimore, Orlando, Cincinnati, Sacramento, Pittsburgh and Milwaukee. Sixteen percent said they are following local TV news "more." The only medium surpassing local TV was the Internet, cited by 17% of respondents. Newspapers, radio and print magazines trailed at 10%, 9% and 6%, respectively.

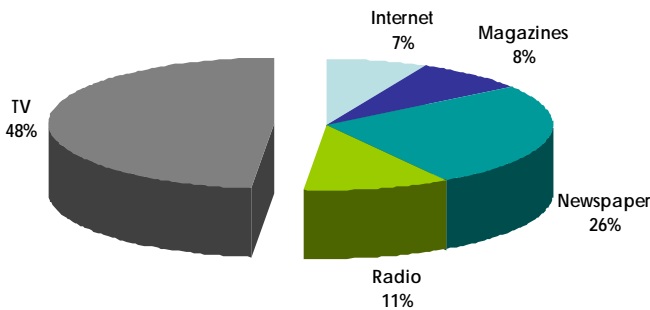
Commercials airing on local TV news engage consumers more than other traditional media. When asked which types of ads respondents pay more attention to, 57% cited local TV versus 43% for magazines; 64% versus 36% for newspapers, 72% versus 28% for radio, 81% versus 19% for yellow pages, and 55% versus 45% for direct mail. **Respondents also found local TV ads more engaging than all forms of online ads,** on average 85% for local TV versus 15% for online ads.

Local news also got the highest scores compared to other media for creating "buzz," having memorable ads, and the medium was on par with print magazines for trustworthiness and recall. Local news was also on par with print newspapers as the most important source of community information.

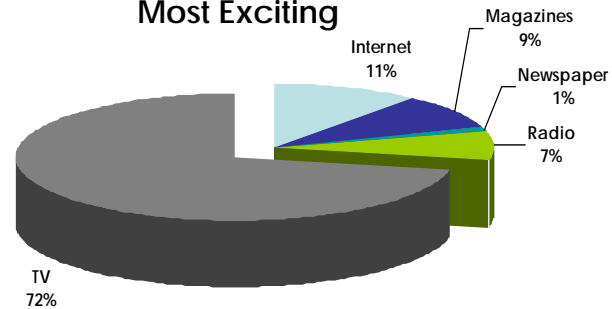
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TV Advertising is Authoritative, Exciting, Influential, and Persuasive Among A18-34

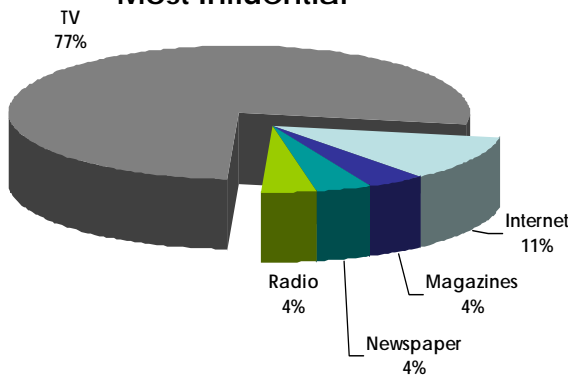
Most Authoritative



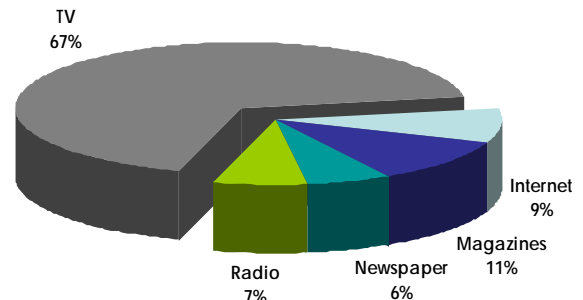
Most Exciting



Most Influential



Most Persuasive



Why Television Still Shines in a World of Screens

New York Times, February 8, 2009 (portion of the text reprinted)



Subscribers to print newspapers have gone missing, as everyone knows. Book publishers are also wondering where readers have disappeared to. And yet television stands out as the one old-media business with surprising resilience. Though we are spending a record amount of time online, including a record amount of time watching video, we are also watching record amounts of very old-fashioned television, according to Nielsen Media Research. Our attachment to the medium, of course, is obscured by the splintering of our attention across so many cable offerings, in addition to the major networks.

Consider that the average American household consists of 2.7 persons and contains 2.9 television sets, in front of which we sit for record-setting spells, according to Nielsen figures. In the quarter ended Sept. 30, the typical American watched 142 hours of television monthly, up about five hours from the same quarter the previous year. Internet use averaged more than 27 hours monthly, an increase of an hour and a half, according to Nielsen.

We are so smitten with screens that we often can't bear to choose one over another: **31% of Internet use occurs while we're in front of a TV set.** We are also taking an interest in watching video on our phones: 100 million handsets are video-capable.

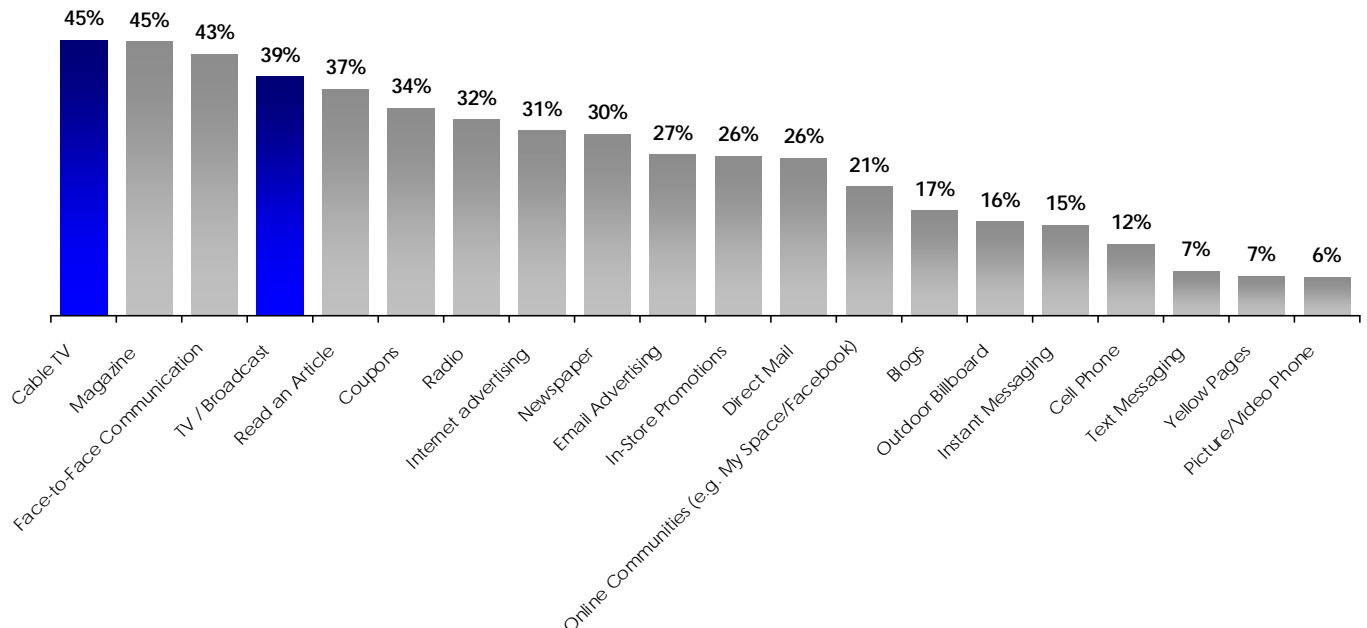
You now hear talk in the advertising trade of our "three screens": television, the Internet and mobile devices. When I asked representatives of major ad agencies about how they chose the optimal mix of media for clients, I was led back, again and again, to television. That's not just because it remains the one place where an advertiser can gather a truly mass audience for a single commercial message, but also because it provides what advertisers call an "immersive experience."

We used to speak of reading a book as an immersive experience, too, but "immersive" now seems shorthand for "video on a screen."

TV Helps Drive the Internet

Which of the following triggers you to start an online search?

Adults 18-34



Source: SIMM (Simultaneous Media Usage Survey), BIGResearch, June 2008



Broadband Video Content Is Seen As An Enhancement To The Traditional TV Experience

While broadband video consumption is on the rise, a Horowitz Study proves that traditional TV remains the preferred platform

- **70% of Internet users who watch TV online said they did so because they missed the episode shown on television**
- **18% said they watch television shows online to watch them again, having first viewed the program on TV**
- **20% said they watched programming online when they happen to find them or if someone told them about a particular show they could view online**

Source: AdWeek, *Broadband Video Grows: TV Preferred* 1/2/2008, Results from a Horowitz Associates Online Survey, conducted Sept.-Oct 2007, polled 1,008 18+ U.S. homes with Internet users.

People Spend Significantly More Time Viewing Video Content on Traditional TV

- **According to Nielsen's Anytime Anywhere Media Measurement, among young adults 90% of their total video content consumption per month occurs while viewing traditional TV**

Source: Nielsen A2/M2 Three Screen Report, 4Q08

Monthly Time Spent in Hours: 4Q08		
	A18-24	A25-34
Traditional TV	118:28	142:29
Timeshifted TV	5:01	10:50
Internet Video	5:03	4:14
Mobile Video	2:53	3:42

Upcoming MMRCLA Meetings:
April 30 – TNS: Green Auto Study
June 18 – Kelton Research:
The Changing American Consumer,
Recession Study

New and returning members:

The Nielsen Company