



The Media Life of the American Consumer - November 2008

Selected Insights from

The Longitudinal Media Experience Study Wave 2

January 2009

Monitoring Consumers' Media Navigation

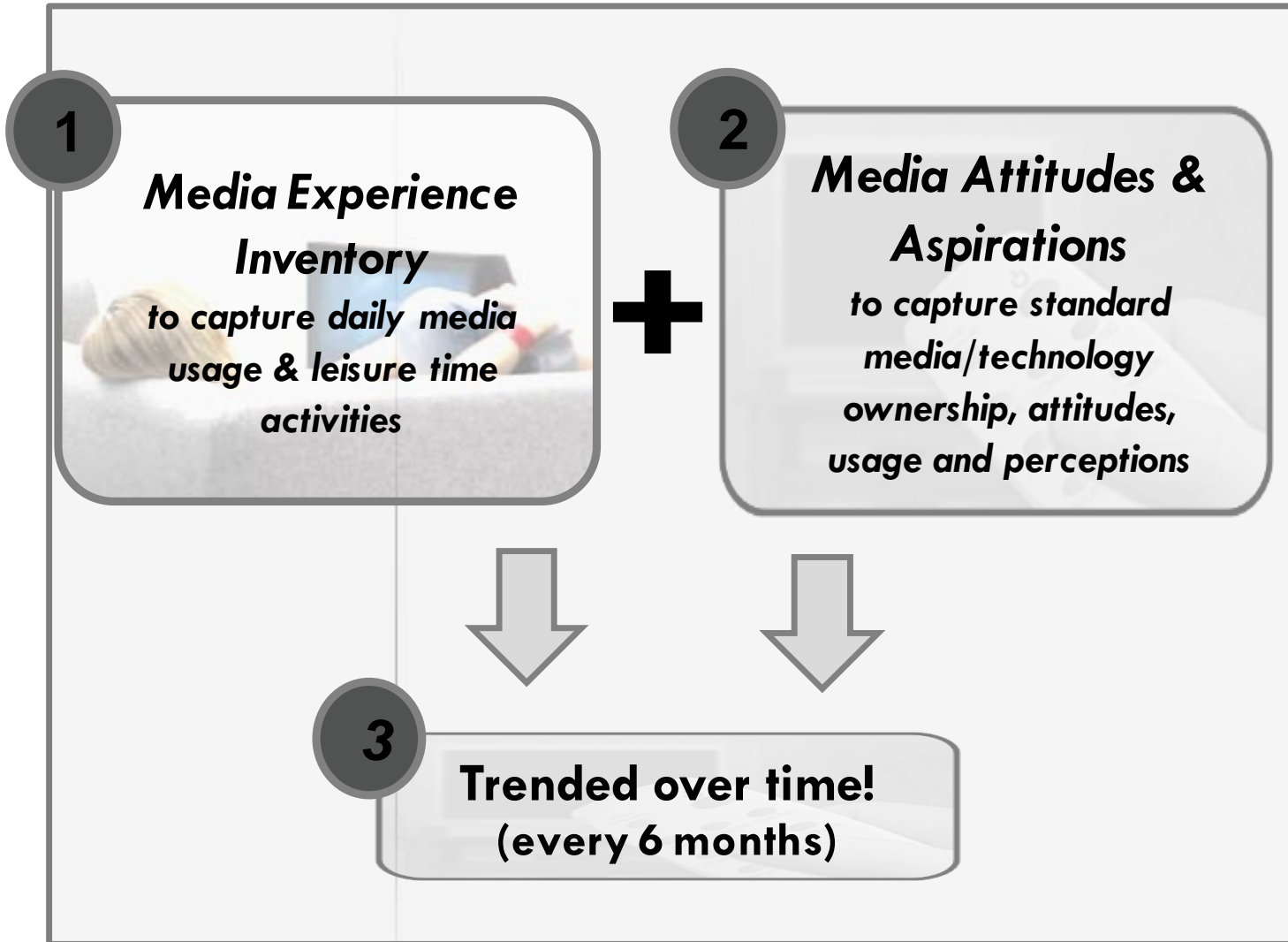
LMX is an innovative syndicated research program that provides insight on:

- Daily time spent across all media platforms
- Media activity details (network, website, genre, device type)
- Insight regarding simultaneous media (and other) activities
- Consumers' ownership, usage, interest and expectations regarding emerging media
 - Current and expected adoption rates for new content offers
 - Current and expected adoption for new devices & technology



Background and Methodology

LMX Overview



LMX Study Details

Media Experience Inventory (eDiary)

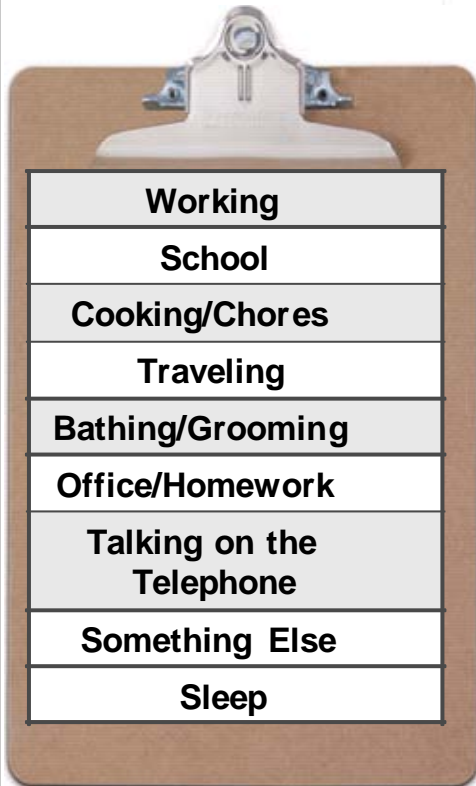
- Respondents asked to provide details in 30 minute increments for the previous day
- Up to three activities could be indicated for a single waking period
- For each activity LMX includes: Who, What, Where & How Long questions

Usage, Attitudes & Aspirations

- Media technology ownership/subscription and usage
- General media behaviors
- Current Experience and Intent for emerging media content
- Demographics

LMX Activities Covered

Non Leisure Activities



Leisure Activities



Media Activities



Study Methodology

Study designed to project to U.S. online population*

- Sample made up of 5,066 Americans ages 13-74
- Stratified quota sample recruitment
- Oversample on Teens // Under sample 55-74

Field Dates Oct 22nd through Nov 4th, 2008

- Media Dates Oct 21st through Nov 3rd, 2008
- 14 Total Days; 10 weekdays & 4 weekend days
- Election Week Data Supplement Nov 5th – Nov 7th
- ~325 each per weekday // ~450 per weekend day

Data Evaluation:

- We oversampled by ~20%
- Applied a series of response quality criteria
- Sample balanced by Age, Gender, Race & Education among those 18+
- Compare Results to Wave 1 // May 6th through May 19th, 2008

* Source: Pew Internet and American Life Project Dec 2007

Sample Demographics

Demographics	Total	13-17	18-34	35-54	55-74
Base Sizes	5066	446	1469	1844	1307
Male	48%	56%	45%	50%	47%
Female	52%	44%	55%	50%	53%
Age 13-17	9%	100%	-	-	-
Age 18-34	29%	-	100%	-	-
Age 35-54	36%	-	-	100%	-
Age 55+	26%	-	-	-	100%
Ed: High School Graduate	63%	8%	65%	70%	68%
Ed: College graduate	17%	*	21%	20%	17%
Ed: Graduate degree	8%	-	6%	8%	12%
Race: White	70%	77%	65%	74%	68%
Race: AA	11%	8%	11%	10%	15%
Race: Hispanic	12%	9%	17%	11%	10%
Employed	54%	19%	63%	67%	38%
Annual HH Income <55K	57%	-	58%	57%	57%
Annual HH Income \$55K+	36%	-	33%	39%	36%
Married/Couple	58%	-	46%	63%	64%
Parent (Child in Home)	35%	-	41%	50%	8%



The American Digital Media Lifestyle Overview

Media Device & Subscription Penetration

(% Respondents)

Device	Total	13-17	18-34	35-54	55+
DVD Player	88%	89%	89%	89%	84%
Desktop computer	83%	77%	73%	87%	90%
Mobile Phone	79%	72%	83%	79%	76%
Cable TV	61%	60%	64%	60%	61%
Laptop computer	49%	42%	61%	47%	41%
Gaming console	45%	69%	65%	45%	15%
HDTV	29%	24%	30%	28%	30%
Satellite TV	26%	26%	25%	26%	28%
DVR	26%	23%	28%	27%	23%
Handheld gaming device	21%	40%	27%	22%	6%
PDA	9%	6%	12%	9%	5%
Personal Video Device	8%	14%	12%	8%	2%
HD-DVD/Blu-Ray	7%	8%	10%	6%	3%

Selected Media & Technology Attitudes

(% Respondents)

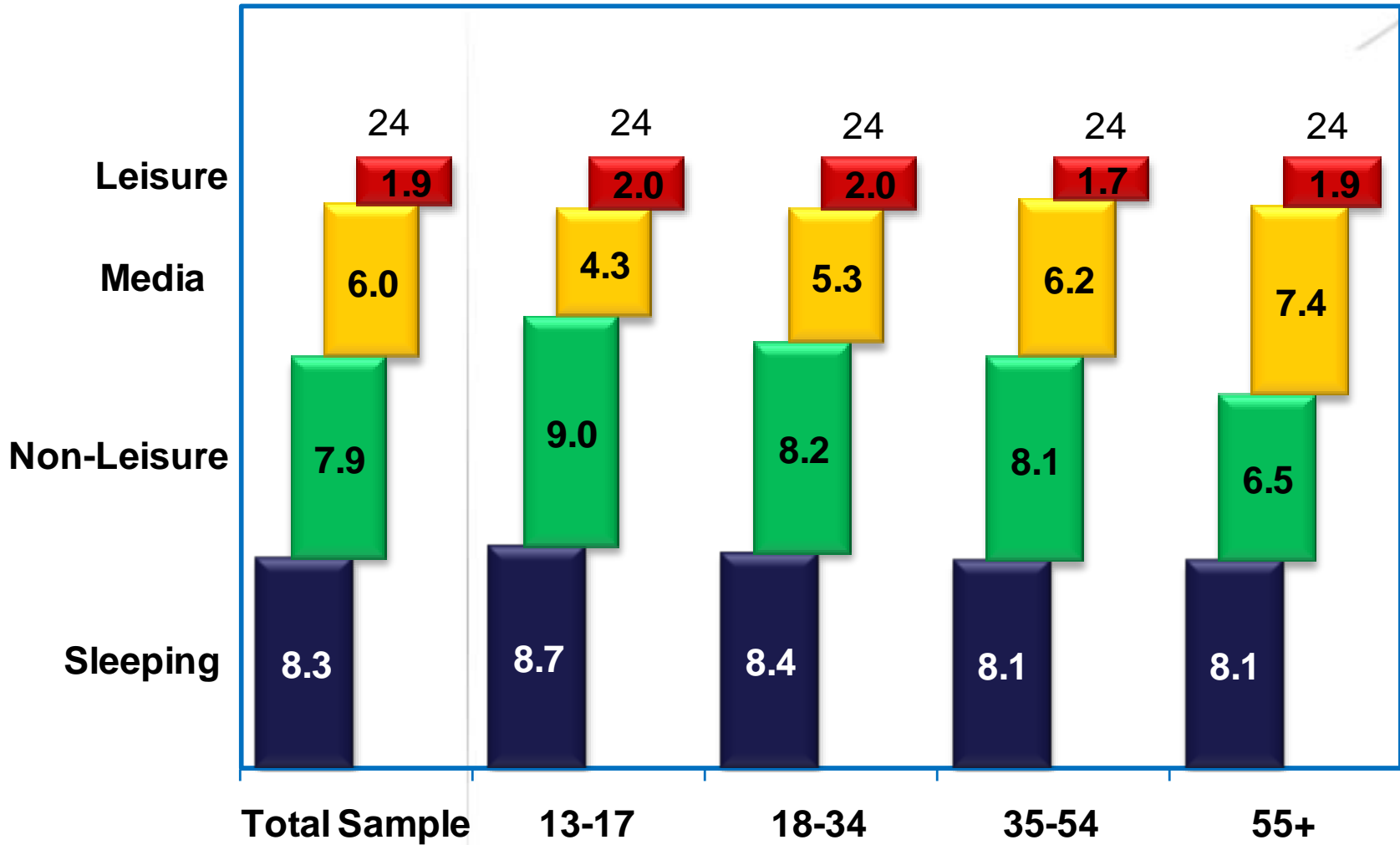
Statement	Total	13-17	18-34	35-54	55+
I often turn on the TV or listen to music as background noise while I do something else	67%	73%	71%	65%	62%
When I watch TV, I'm almost always multitasking with some other activity	58%	60%	65%	56%	52%
Learning how to use new electronic gadgets is something I enjoy	52%	69%	63%	50%	38%
A mobile device is my primary means of keeping in touch with friends and family	49%	58%	68%	46%	30%
It is very important to me that my friends can reach me 24/7	45%	56%	57%	41%	35%
Being able to access the Internet from any location is very important to me	43%	49%	58%	38%	31%

Daily Incidence of Media Activity

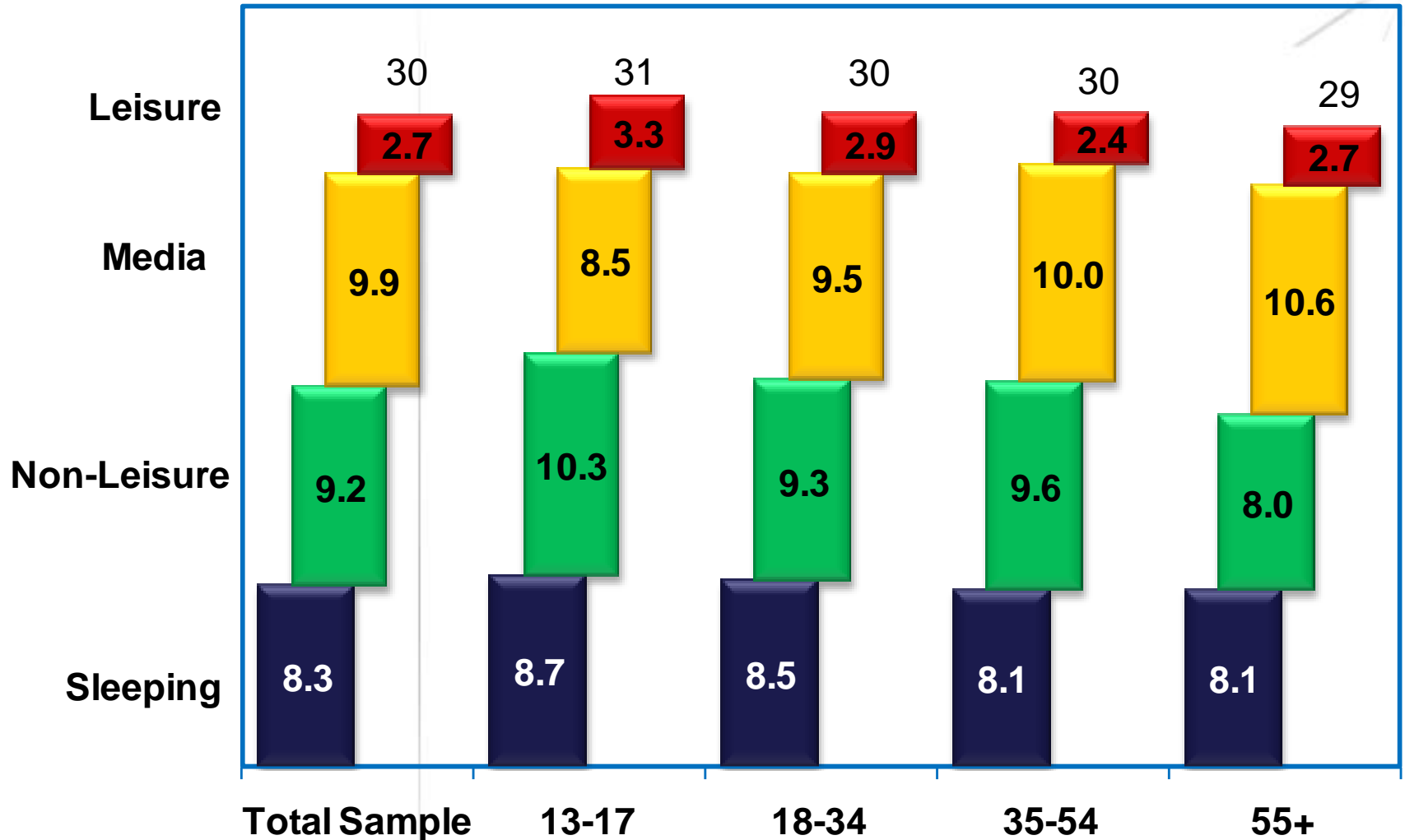
(% Respondents)

Media Activity	Total	13-17	18-34	35-54	55+
TV Viewer (Live + DVR)	85%	72%	82%	88%	91%
Live TV viewer	78%	62%	73%	79%	87%
PC User (all media)	74%	64%	72%	73%	80%
Audio Listening (radio/music)	51%	66%	58%	50%	39%
Radio Listener	40%	39%	41%	42%	35%
Video Gamers (all media)	28%	38%	28%	23%	30%
Newspaper Reader	18%	9%	11%	16%	32%
Mobile Phone User	16%	27%	26%	13%	6%
DVR Viewer	15%	13%	18%	16%	11%
Recorded Music Listener	14%	29%	21%	10%	6%
PC Video Viewer	11%	17%	16%	10%	7%
PC Video Gamer	11%	18%	12%	9%	11%
DVD/VCR	11%	9%	12%	10%	9%
Magazine Reader	8%	9%	8%	8%	9%
Console Video Game	6%	17%	11%	4%	1%

The "Linear" Day



The "Typical" day



The Media Day

Key Media Day Facts

- Media is involved with over **60%** of the waking day
- The Average person engages with at **least 3 media platforms per day**
- **20%** of consumers engage with over **4 media platforms per day**
- **46%** engage in **simultaneous media usage** at least once during the day

Average Daily Time (Hrs)

Media Activity	Total Sample	13-17	18-34	35-54	55+
Television Activities	4.2	2.3	3.6	4.5	5.2
Personal Computer	3.1	2.4	2.9	3.2	3.2
Audio	1.4	1.3	1.6	1.4	1.1
Print	0.7	1.5	0.6	0.6	0.9
Mobile Phone	0.2	0.6	0.3	0.2	0.1
Video Games*	0.2	0.4	0.3	0.1	0.1

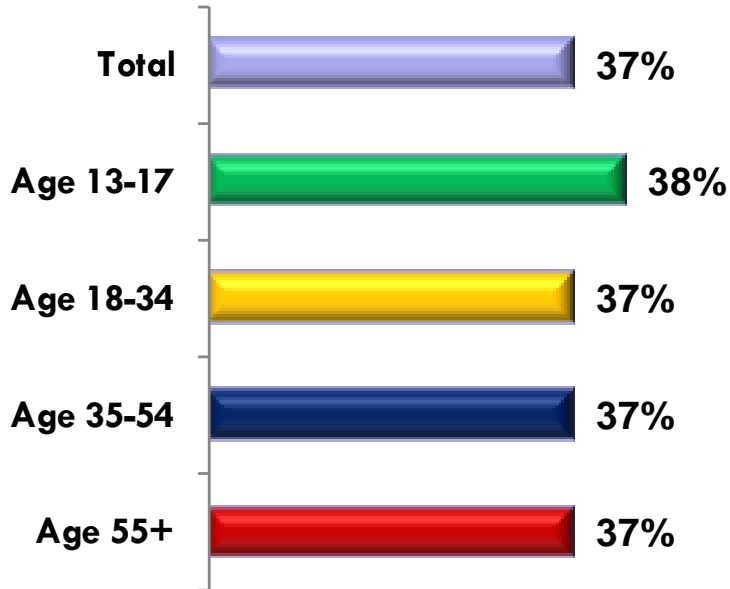
* Handheld & Console game play



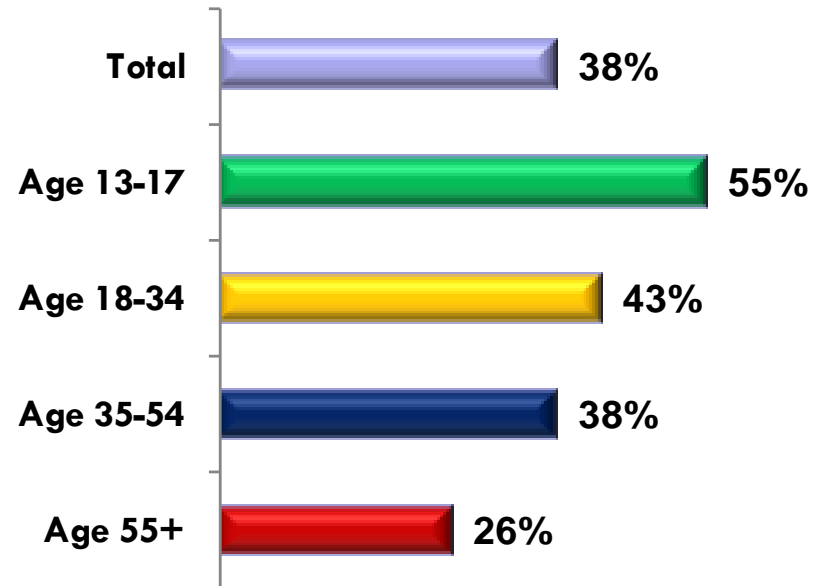
Multi-tasking in the Context of Specific Media Activities

TV & Multi-tasking

**Any Multi-tasking while watching Live TV
(% of Occasions)**

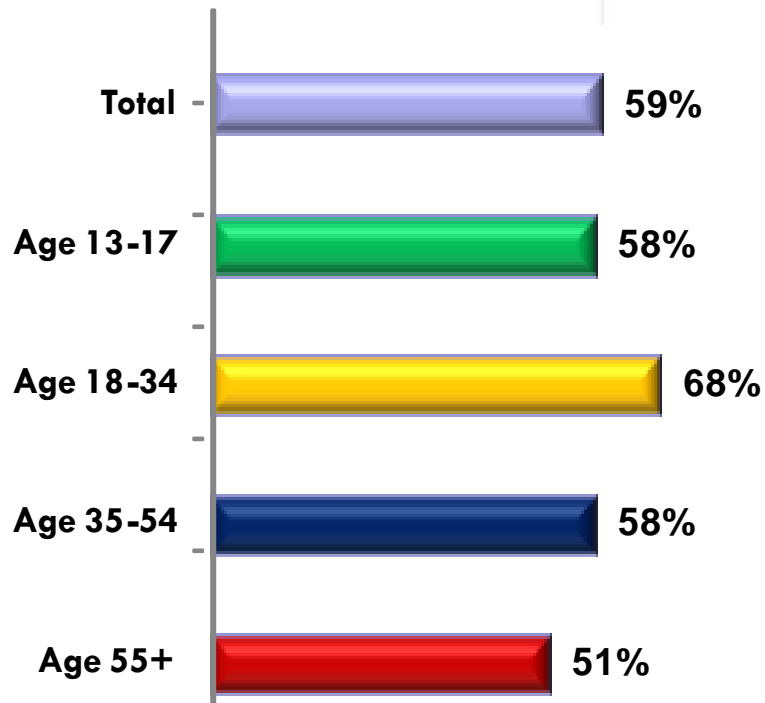


**Any Multi-tasking while watching DVR
(% of Occasions)**



Live TV & Media Multi-tasking

Ever Go Online while watching TV
(% Live TV Viewers)

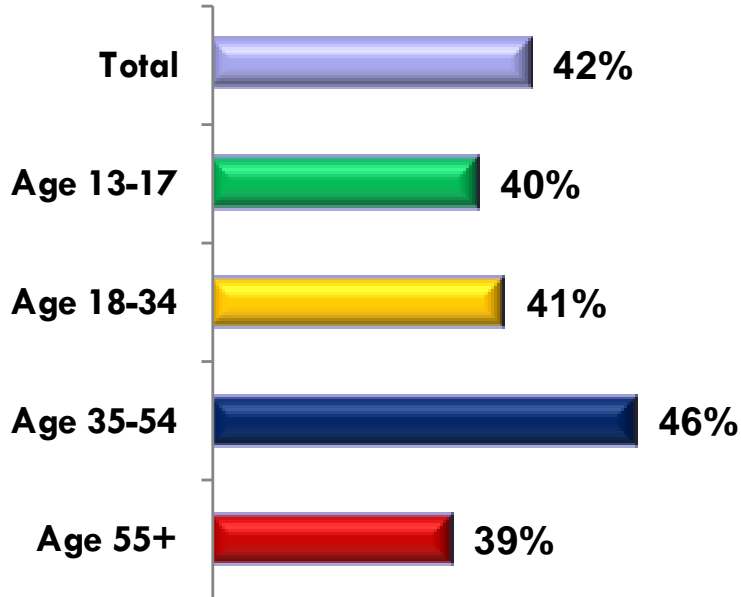


Live TV Multi-tasking
(% of Live TV Time)

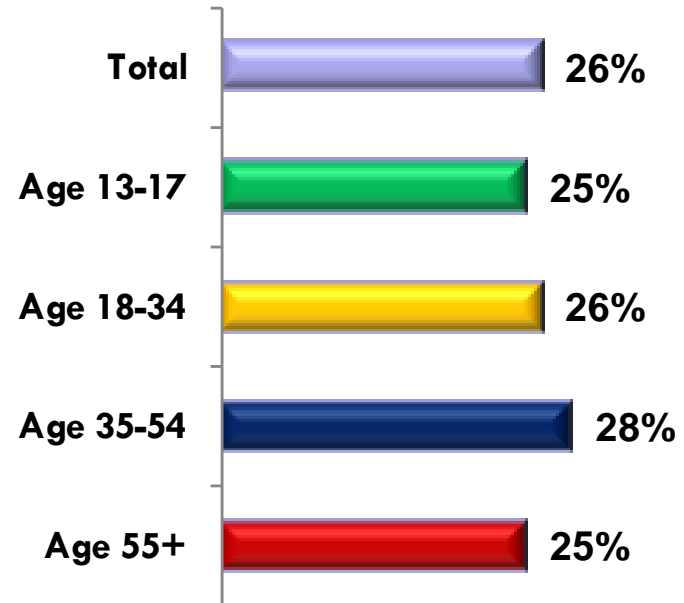
Multi-tasking	Total	13-17	18-34	35-54	55+
PC	11%	11%	9%	13%	11%
Reading	3%	1%	1%	2%	4%
Mobile	1%	4%	1%	0%	0%
Video Games	1%	2%	1%	0%	0%
Total Media	19%	21%	20%	17%	16%
Non-Media	18%	17%	17%	20%	21%

Personal Computer Activities

**Any Multi-tasking while on PC
(% of Occasions)**

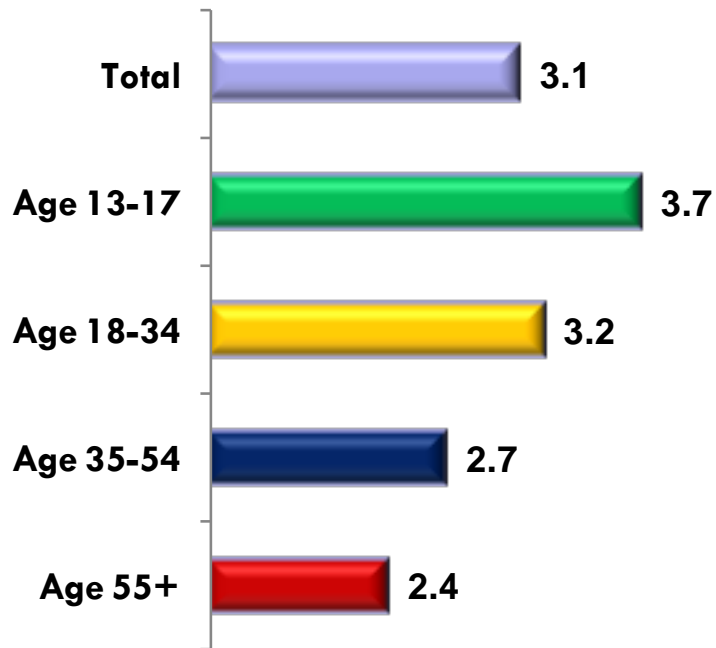


**Media Multi-tasking while on PC
(% of Occasions)**



Personal Computer Activity Profile

Average number of PC Activities per Occasion



**PC Activities
(% of PC Occasions)**

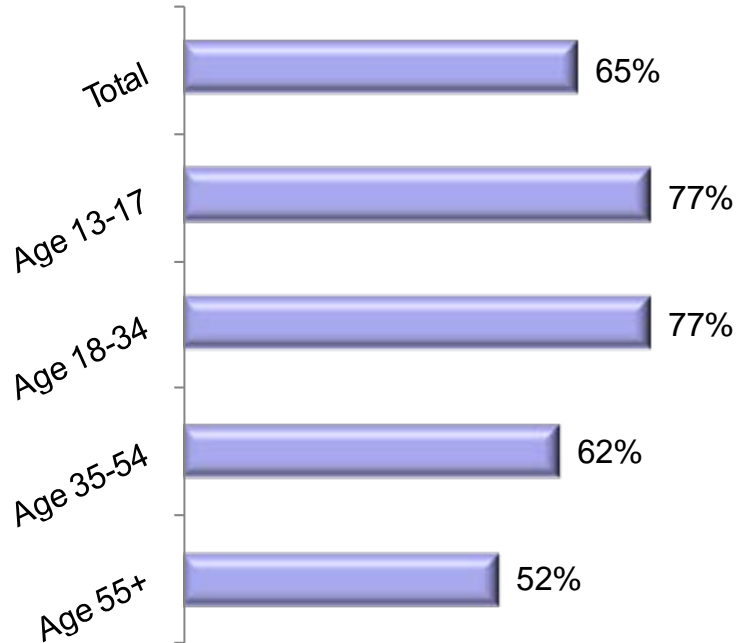
PC Activities	Total	13-17	18-34	35-54	55+
Email	69%	47%	61%	72%	77%
Surfing the web	45%	49%	58%	45%	36%
Research info	18%	16%	19%	16%	21%
Banking	16%	1%	13%	16%	20%
Social nets	15%	39%	25%	17%	3%



Monitoring Activity of Emerged & Emerging Media

Online Video Experience

Online Video Experience
(% Respondents)



Online Video Genre Experience
(% Experienced Respondents)

Video Type	Total	13-17	18-34	35-54	55+
News	29%	18%	31%	29%	30%
Movie clips/trailers	25%	34%	36%	24%	13%
Music videos	22%	43%	34%	19%	8%
TV shows	22%	28%	37%	18%	9%
Jokes/funny clips	21%	33%	31%	18%	12%

Online Video Preferences

**Online Video Content Preferences
(% of Interested Respondents)**

Video Type	Total	13-17	18-34	35-54	55+
TV shows	50%	42%	52%	47%	56%
Full length movie	46%	56%	47%	43%	41%
Music videos	42%	58%	44%	35%	26%
Movie clip/trailers	39%	40%	37%	45%	28%
News/current event	29%	8%	27%	34%	57%

Online Video Drivers & Barriers

Online Video Interest Reasons

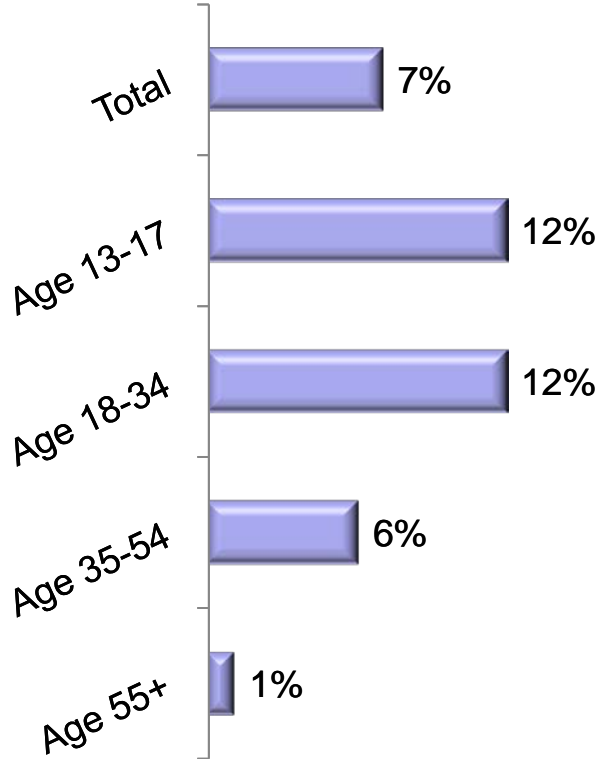
Reasons for Interest	Total	13-17	18-34	35-54	55+
Some other reasons	32%	27%	20%	35%	46%
Catch up on TV episodes	24%	18%	29%	25%	19%
Entertainment away from TV	18%	22%	21%	16%	16%
Access content not otherwise available	12%	15%	13%	12%	10%
More variety than what is on TV	10%	14%	12%	10%	8%

Online Video Interest Barriers

Reasons for Non-Interest	Total	13-17	18-34	35-54	55+
Can get content on regular TV	36%	26%	29%	35%	46%
PC location is uncomfortable	29%	27%	30%	30%	27%
Picture/sound quality compromised	20%	27%	26%	18%	17%
Some other reason	18%	20%	16%	20%	18%
Cost too much	15%	18%	12%	12%	15%

Mobile Video Experience

Mobile Video Experience
(% Respondents)



Mobile Video Content Preferences
(% of Interested Respondents)

Video Content Type	Total	13-17	18-34	35-54	55+
TV shows	42%	36%	48%	40%	28%
Music videos	30%	55%	31%	21%	14%
Movie Clips/Trailers	28%	29%	33%	23%	20%
News/current events videos	21%	5%	19%	30%	29%
Sport highlights	15%	13%	14%	16%	21%

Mobile Video Drivers & Barriers

Mobile Video Interest

Reason for Interest	Total	13-17	18-34	35-54	55+
To entertain myself away from TV	49%	58%	52%	45%	29%
Some other reason	23%	22%	20%	25%	29%
To access time sensitive information	13%	6%	12%	15%	20%
To catch up recent TV episodes	12%	9%	12%	11%	18%
To access programs/videos that aren't otherwise available	4%	5%	4%	4%	3%

Mobile Video Barriers

Reason for Non-Interest	Total	13-17	18-34	35-54	55+
Small Screen	60%	48%	62%	60%	60%
Cost	36%	44%	36%	36%	35%
Can get video on TV or PC	37%	32%	35%	35%	44%
Picture/Sound Quality	31%	33%	35%	29%	28%
Would need to upgrade mobile device	21%	27%	23%	17%	20%

Next Steps

Plans For LMX - Wave 3:

- Field Dates: April 14th – 30th 2009
- New areas of attitudinal exploration
 - Mindsets of consumers driving media choices
 - Consumer purchase behavior across key categories
- Increase sample size to 10,000 per wave
- Enhance eDiary interface

LMX – Overall Project Enhancements

- In partnership with IPG Media Lab for added value Experiential component
- Developed a Parents & Children supplement (6-12) // Dec., 2008
- Developing Mobile survey solutions to collect “on-the-go” behaviors
- Client custom studies



Thank You!

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