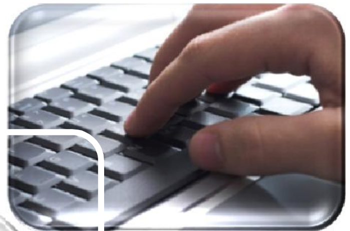


Video Consumer Mapping Study

Appendix 1.

Additional Findings & Presentation Materials

Contents

Note: Each section below is hyperlinked to corresponding slides, available in full screen only.
The <u>Contents</u> text box on bottom right allows returning to this page from anywhere in the presentation.

1. It Was (Almost) All About Age

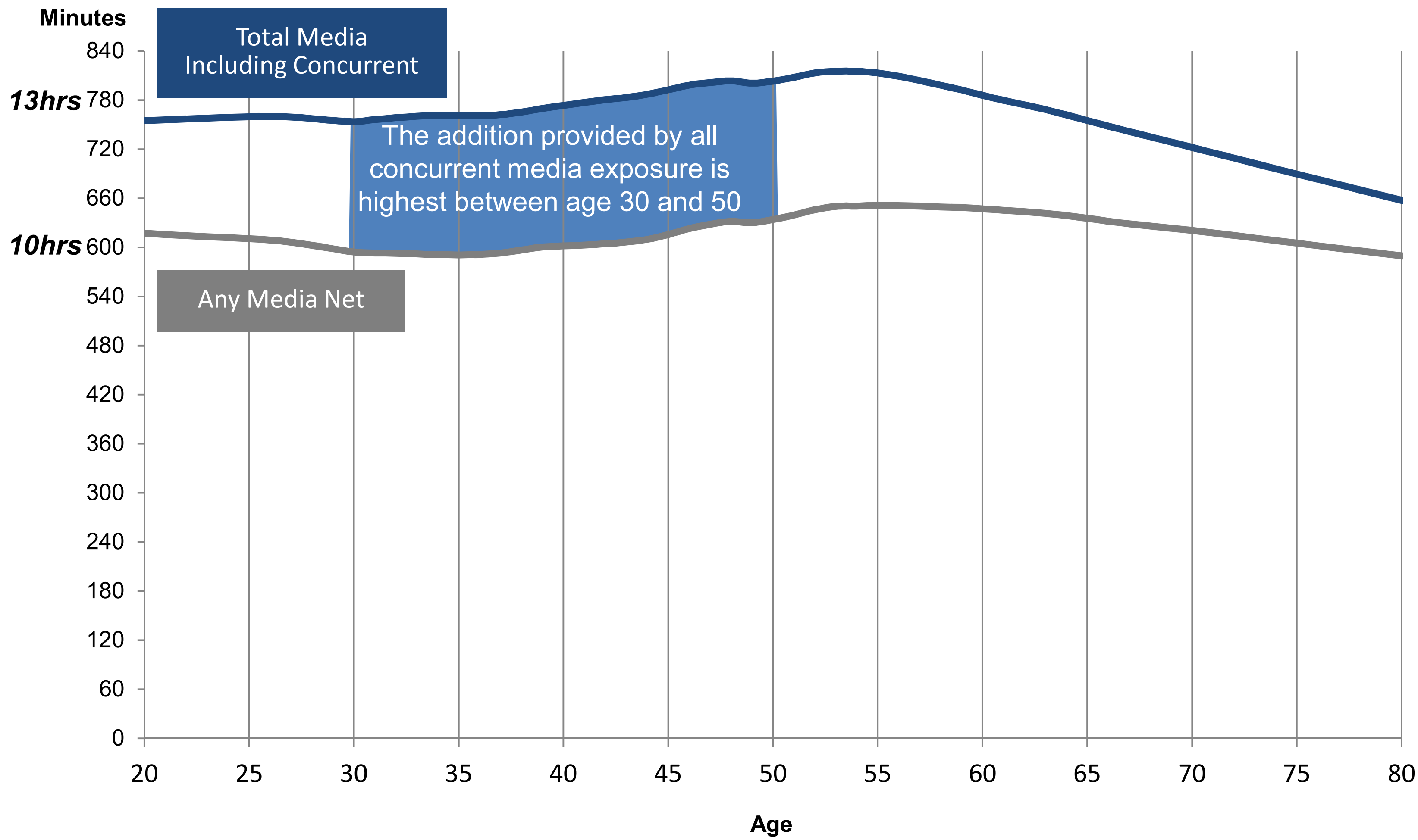
- The Committee encouraged us to “let the data do the talking” about which age groups are most relevant
- This analysis (basically a moving average*) yielded fascinating results, which vary dramatically by media

Confirmation of earlier research or beliefs	New information
Some media consumption differences by age are well-documented	However, the VCM shows age effects on many media, based on a continuous age range

* Using Friedman's Supersmoother technique, applying a nearby 5% sample, therefore roughly a 3-year moving average.

Contents

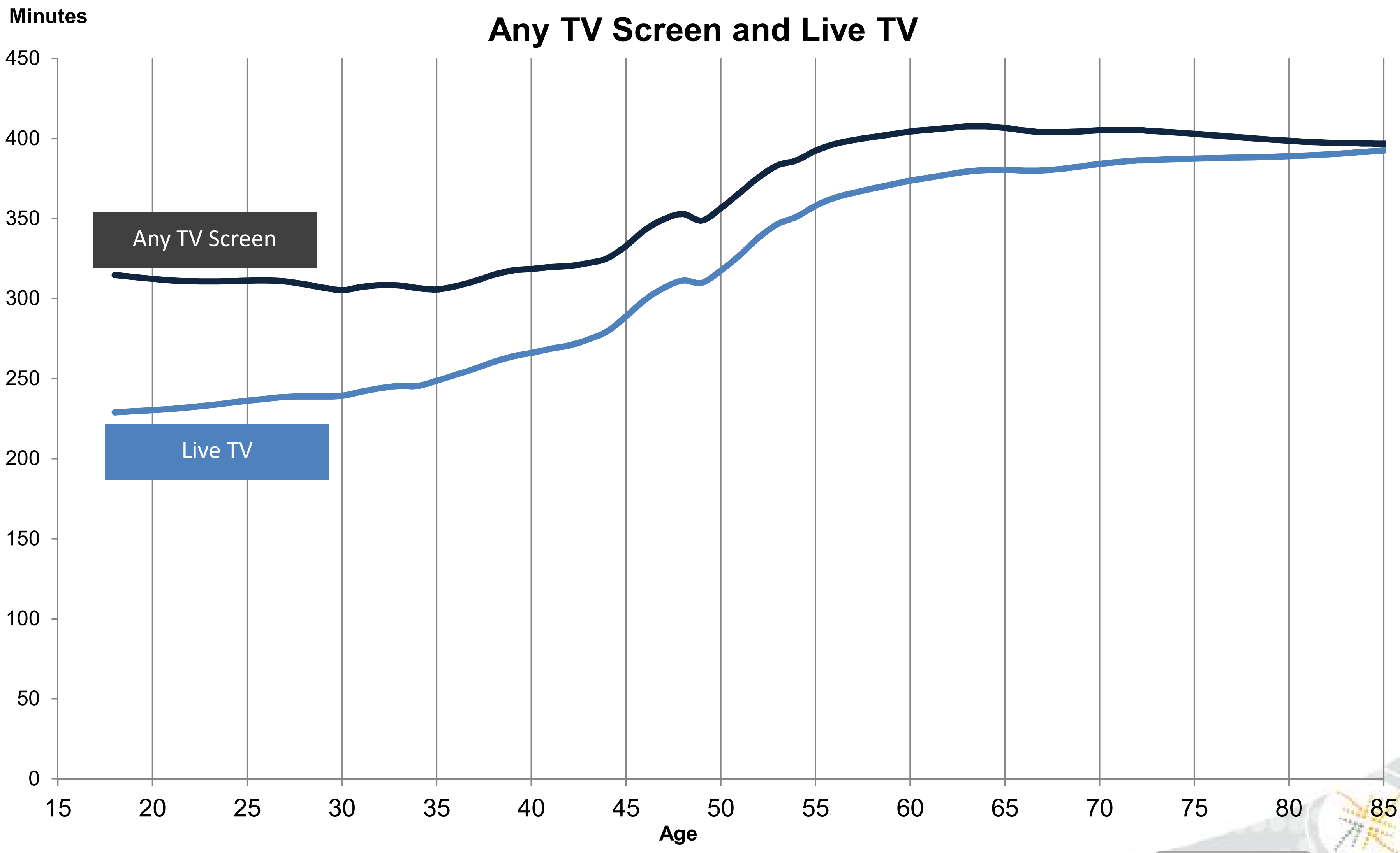
Fitting As Much As 13 Hours Of Media Into 10 Or More Hours Of Media Day



"Any media" includes screen media (focus of the report), audio, print and landline phone.

Contents

Live TV Represented The Vast Majority Of 1st Screen Time, Except For The Youngest



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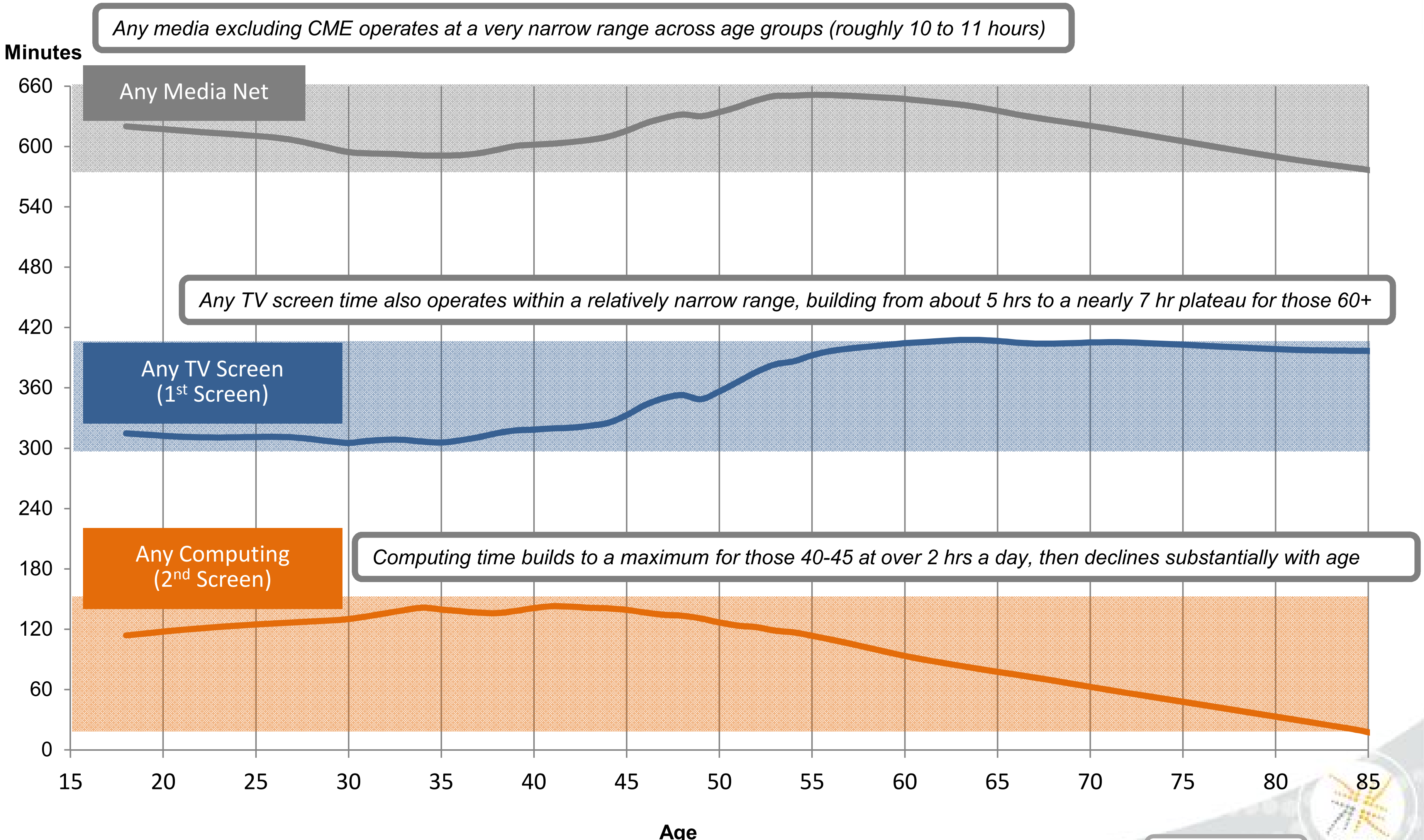
Media Exposure Time Was All About Age, With 1½ Exceptions: Total Media Time And Somewhat The 1st Screen Time



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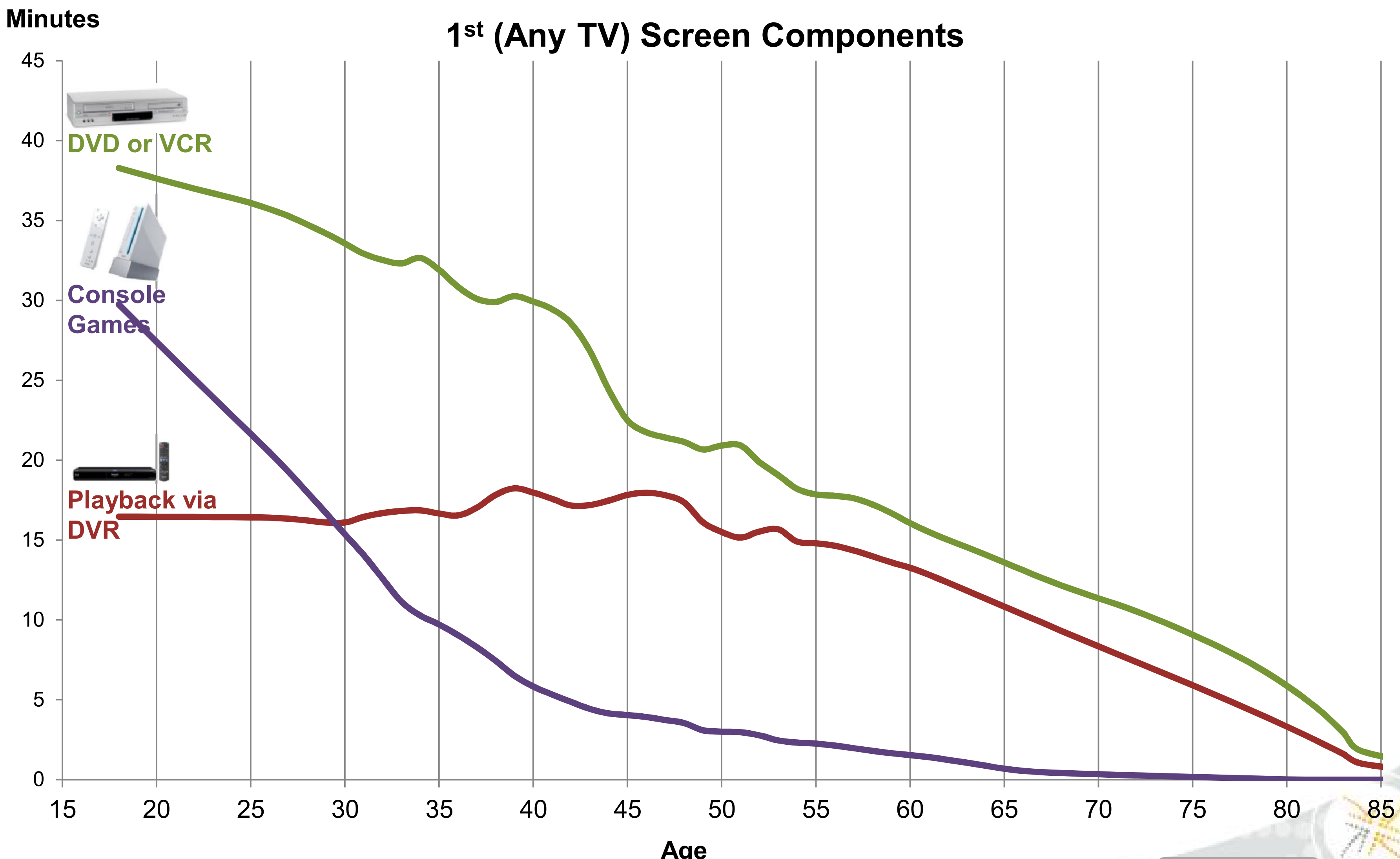
The Decline For 3 TV Screen Media Happens In Different Ways: Early (Console Games), Late (DVRs) Or Consistently (DVDs)



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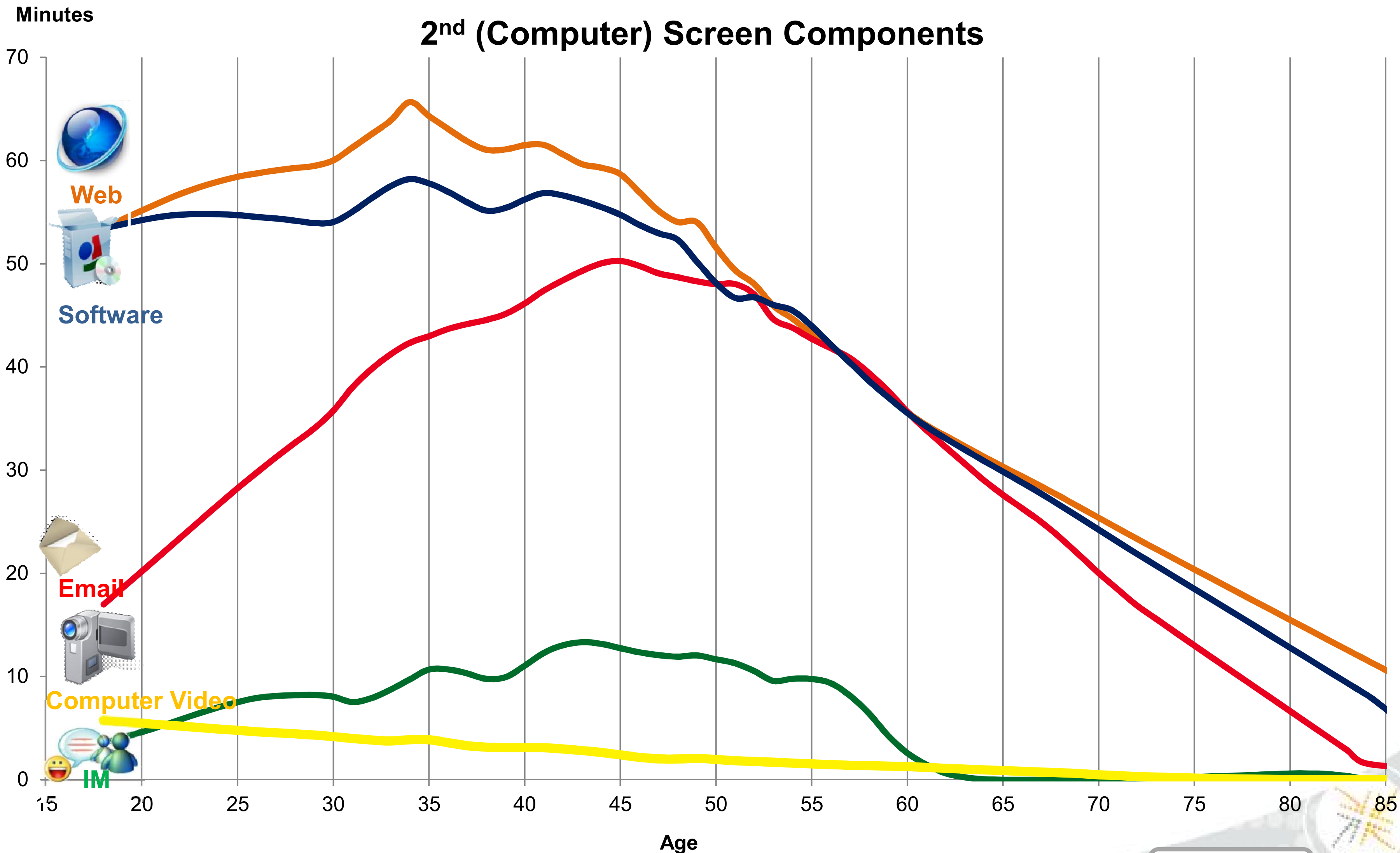
Web And Software Time Peaks In The 30s, Email And IM Time In The 40s



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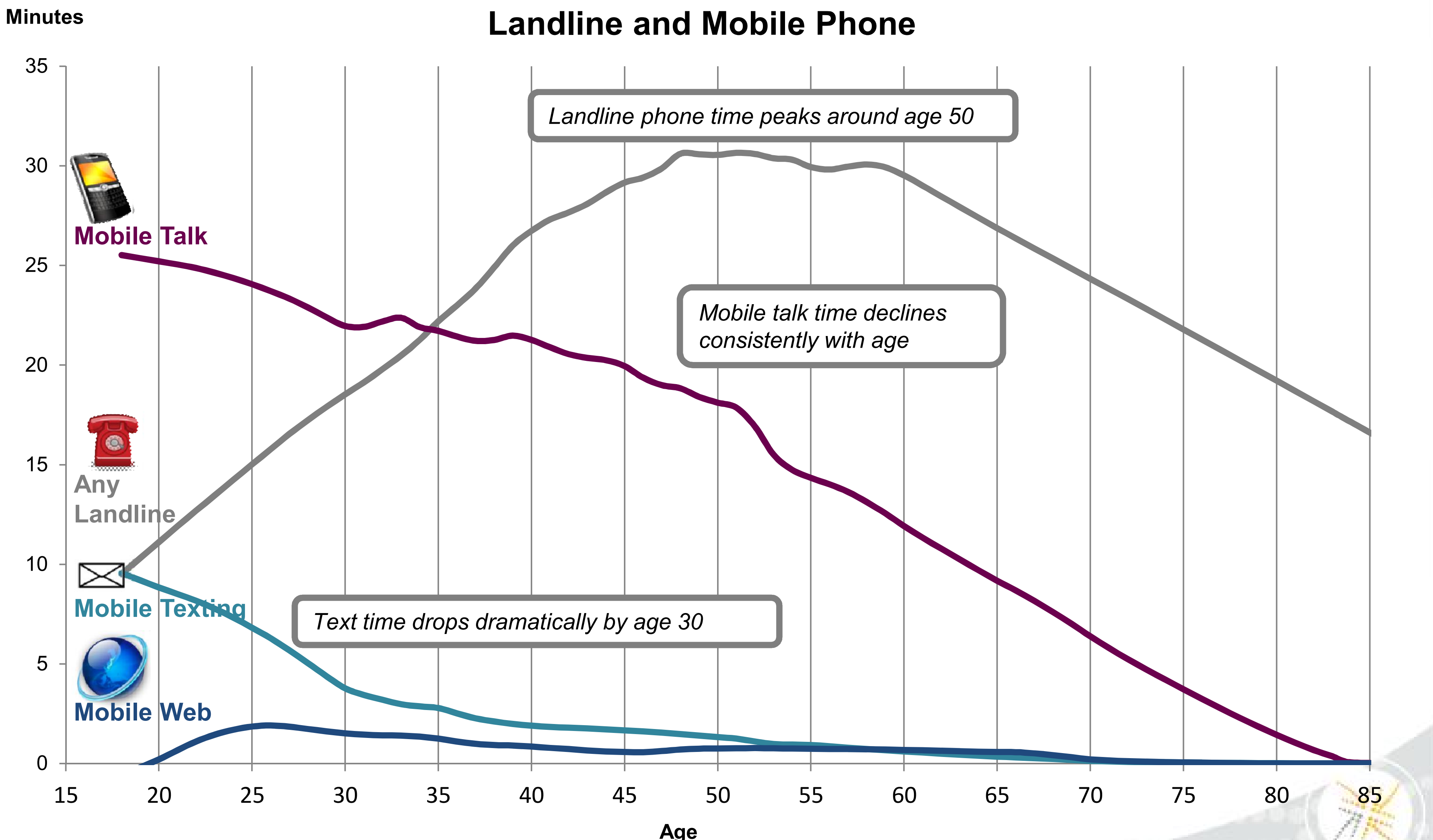
Landline & Mobile Text Had Similar Exposure Time For The Youngest, Then Totally Diverge



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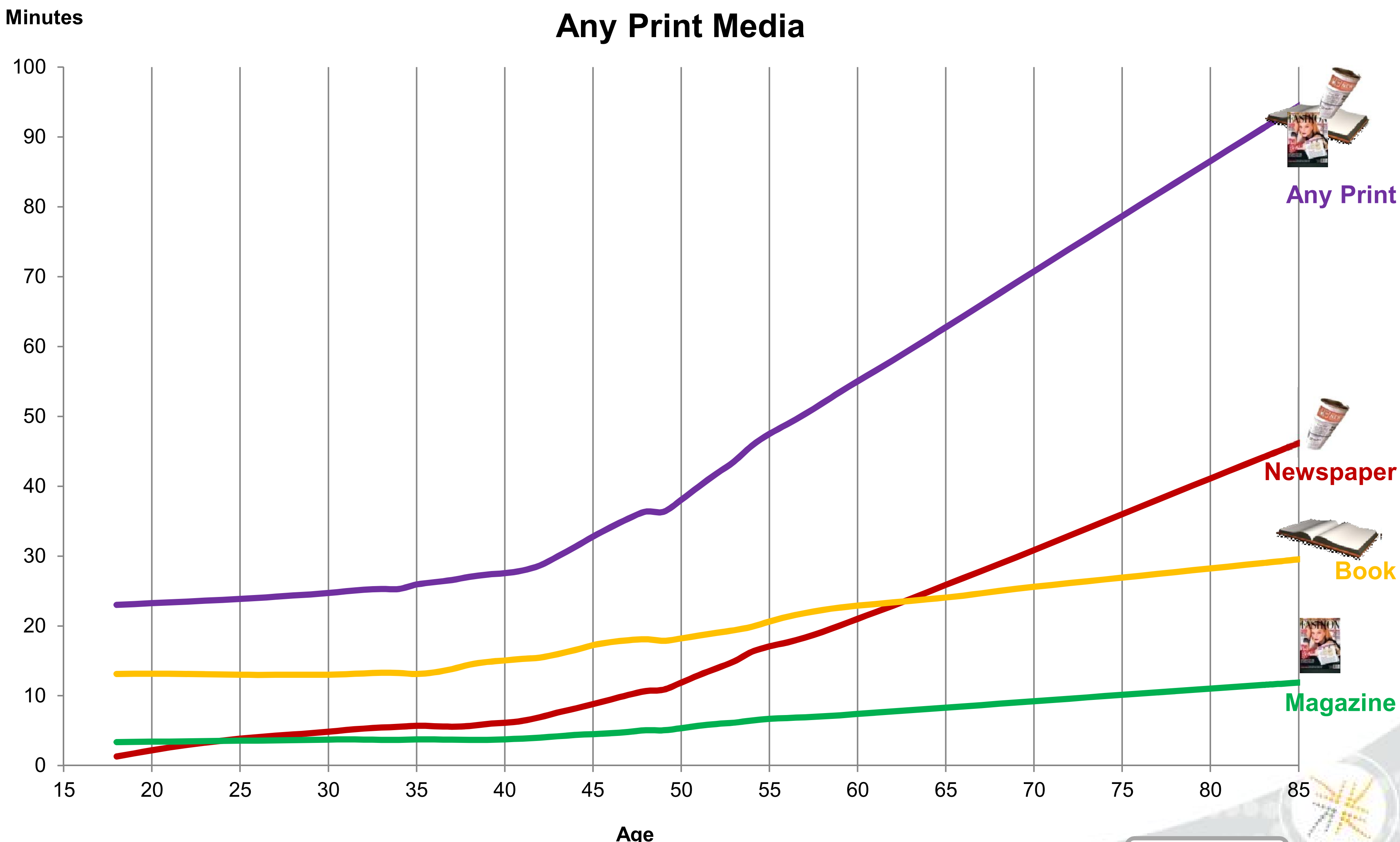
Time Spent With Print Media Increased Dramatically After Age 40, Particularly Newspapers



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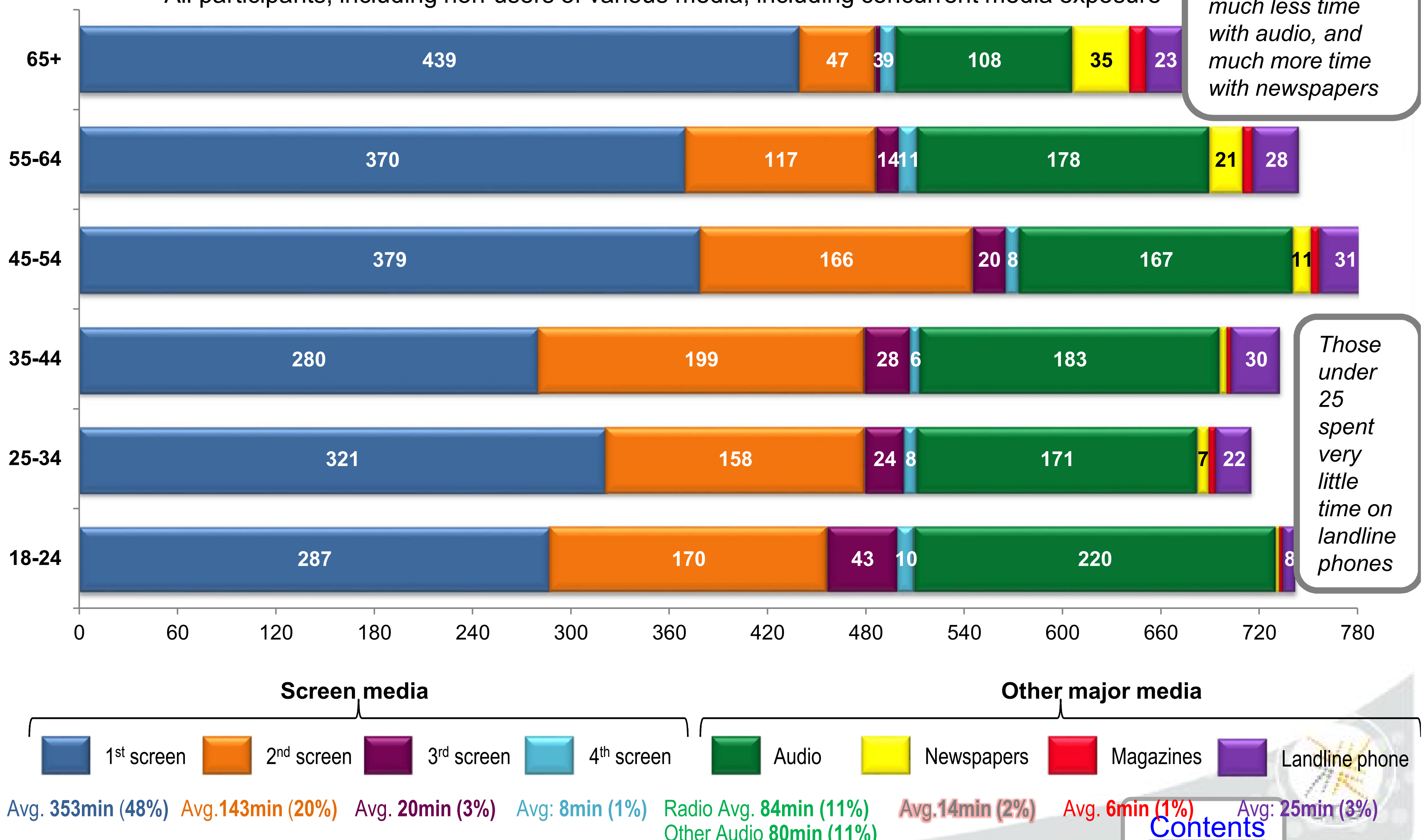
2.

Additional Video Exposure Maps

- Four screen and other major media average duration by age
- Four screen average duration by gender
- Four screen average duration by Spring vs. Fall '08
- Four screen average duration by weekday vs. weekend
- Four screen average duration by day of week combinations
- Four screen and other major media average duration by Spring vs. Fall '08 and weekday vs. weekend
- Video hierarchy average duration by age
- Video hierarchy (excluding total TV) average duration by age

TV Screen, Computer And Audio Account For About 90% Of Total Media Exposure

Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure



Those 65+ spent much less time with audio, and much more time with newspapers

Those under 25 spent very little time on landline phones

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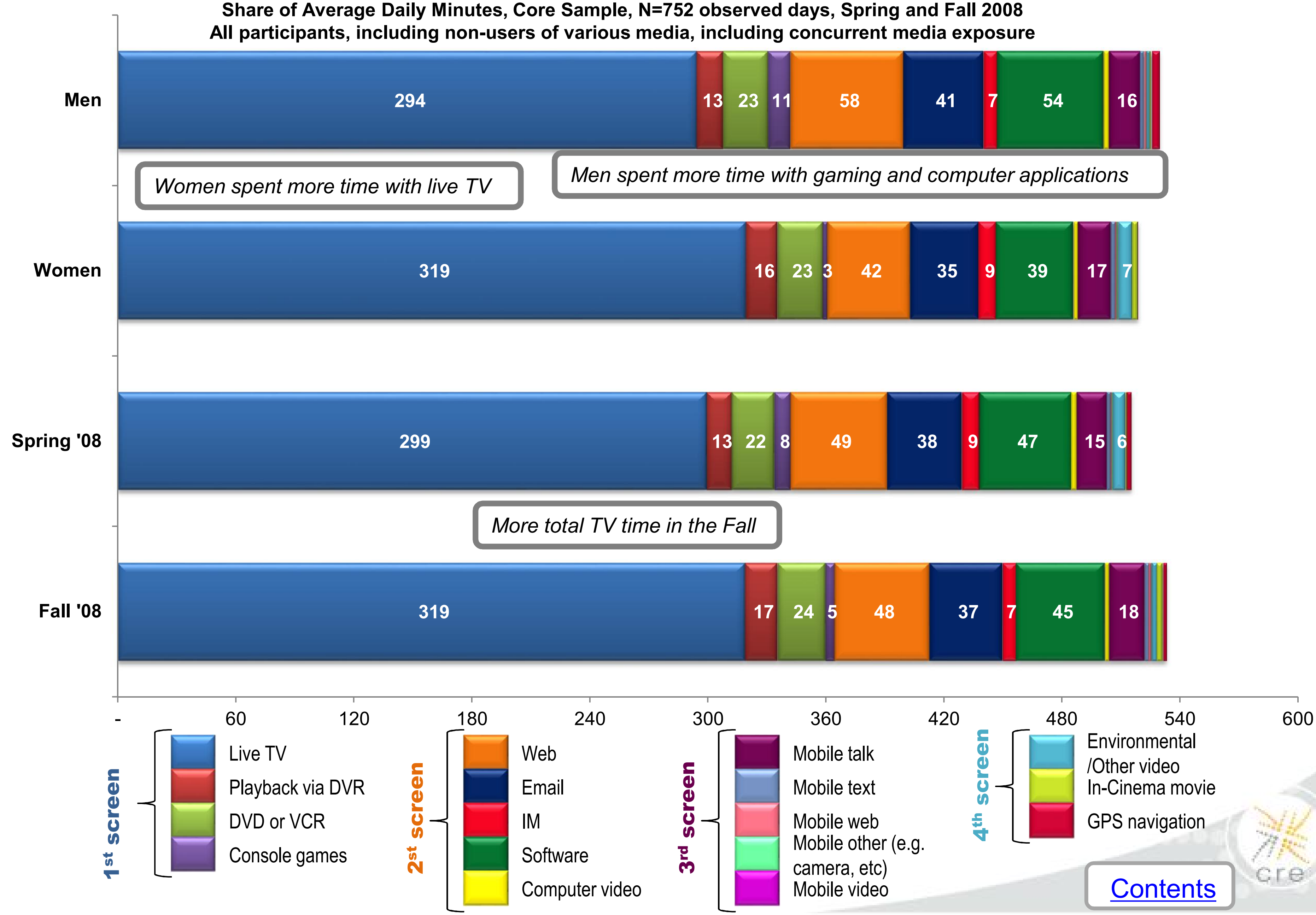
Neither Gender Nor Season Showed The Kind Of Differences That Age Groups Did

Share of Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure



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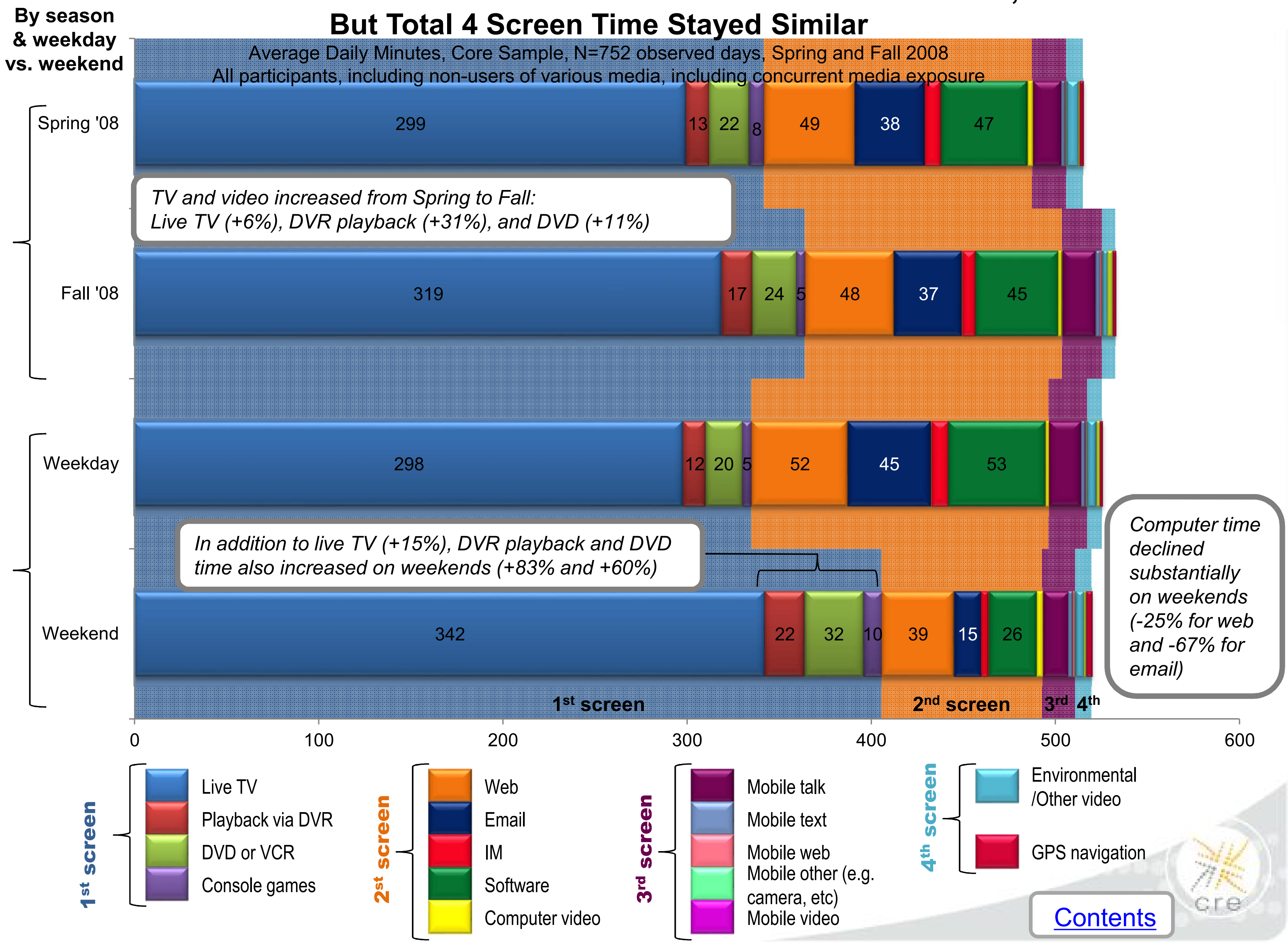
TV & Video Minutes Increased In The Fall And On Weekends, But Total 4 Screen Time Stayed Similar



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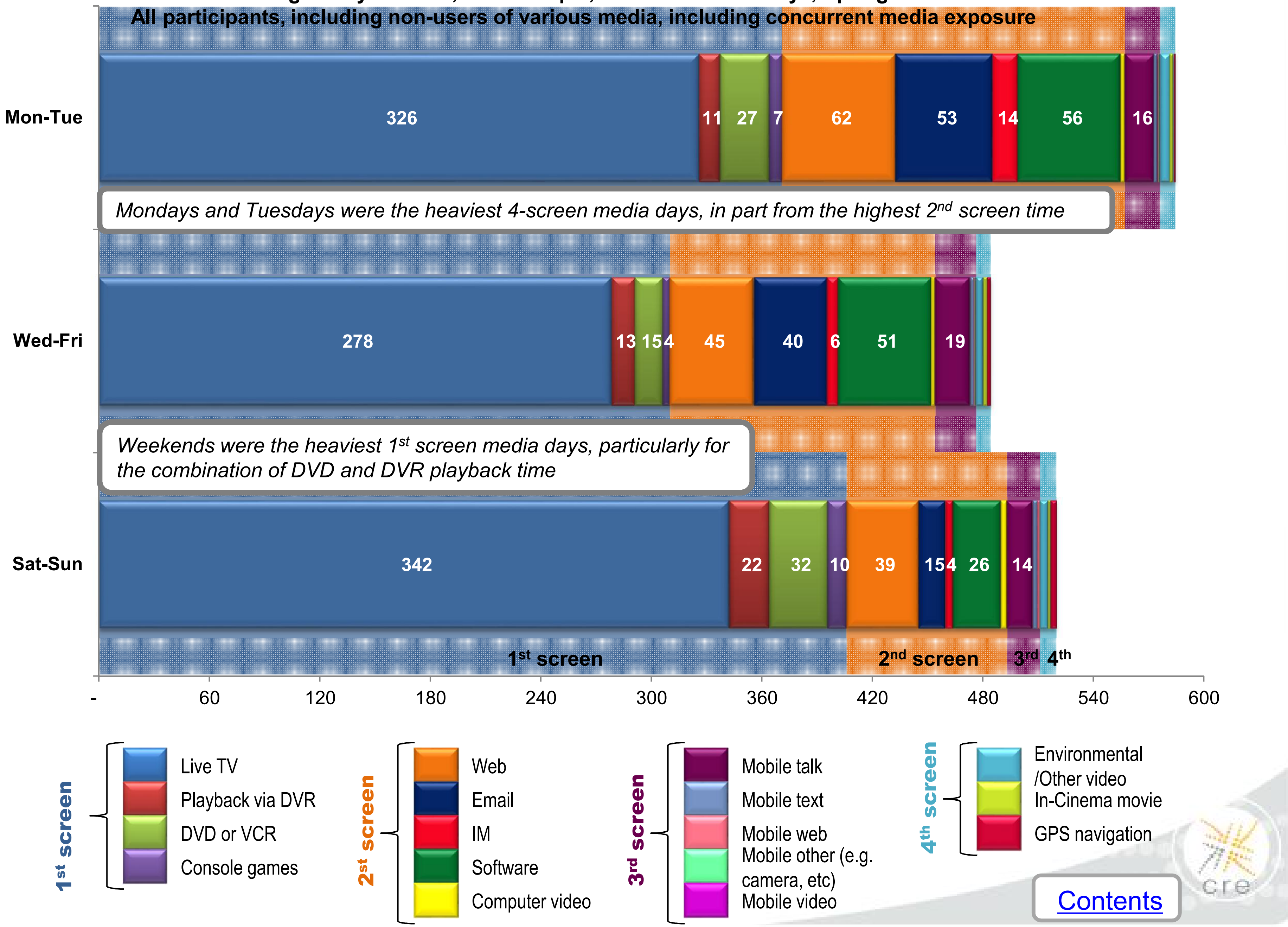
Screen Media By Day of Week

Share of Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008

All participants, including non-users of various media, including concurrent media exposure



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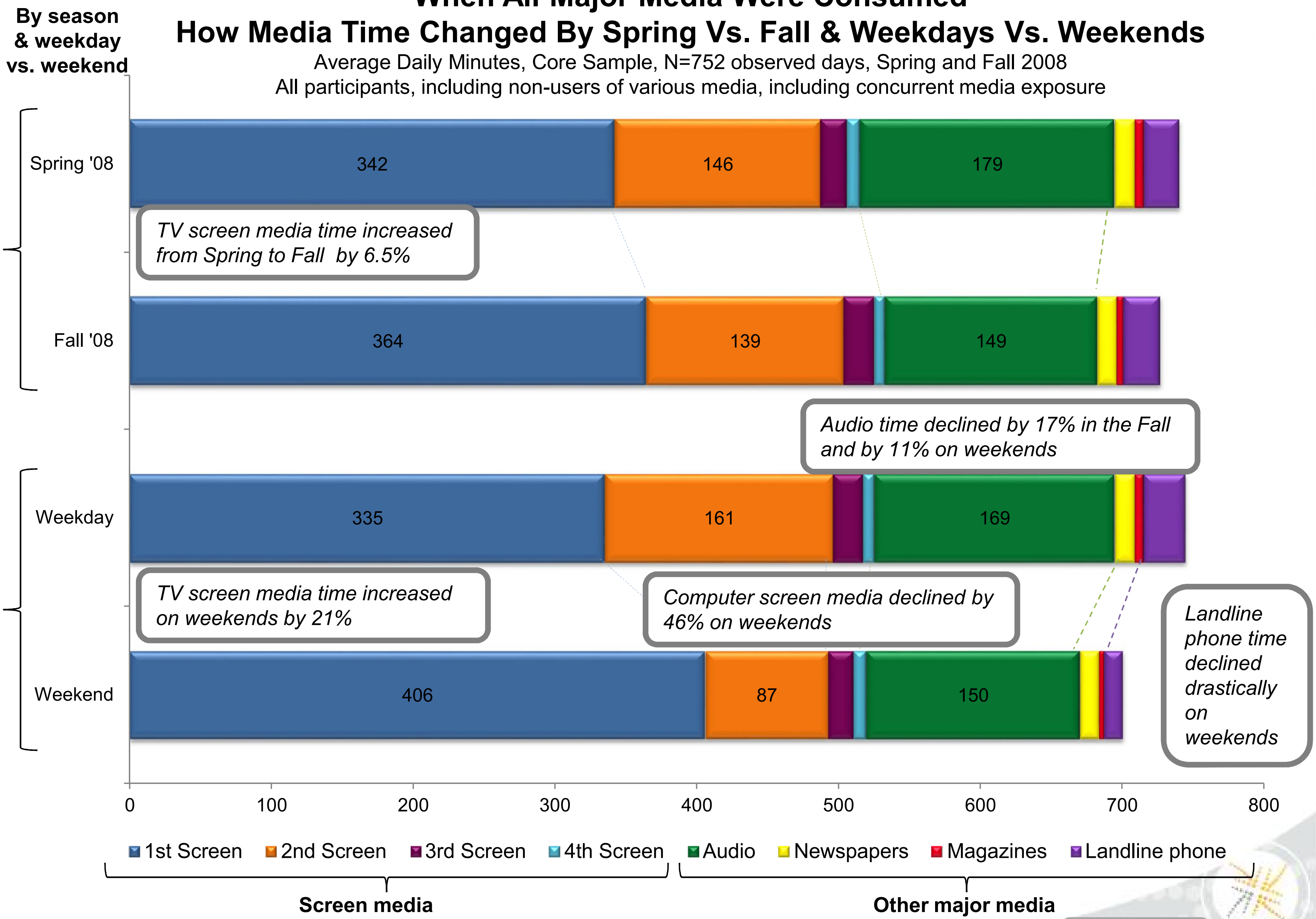
When All Major Media Were Consumed
How Media Time Changed By Spring Vs. Fall & Weekdays Vs. Weekends

Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure



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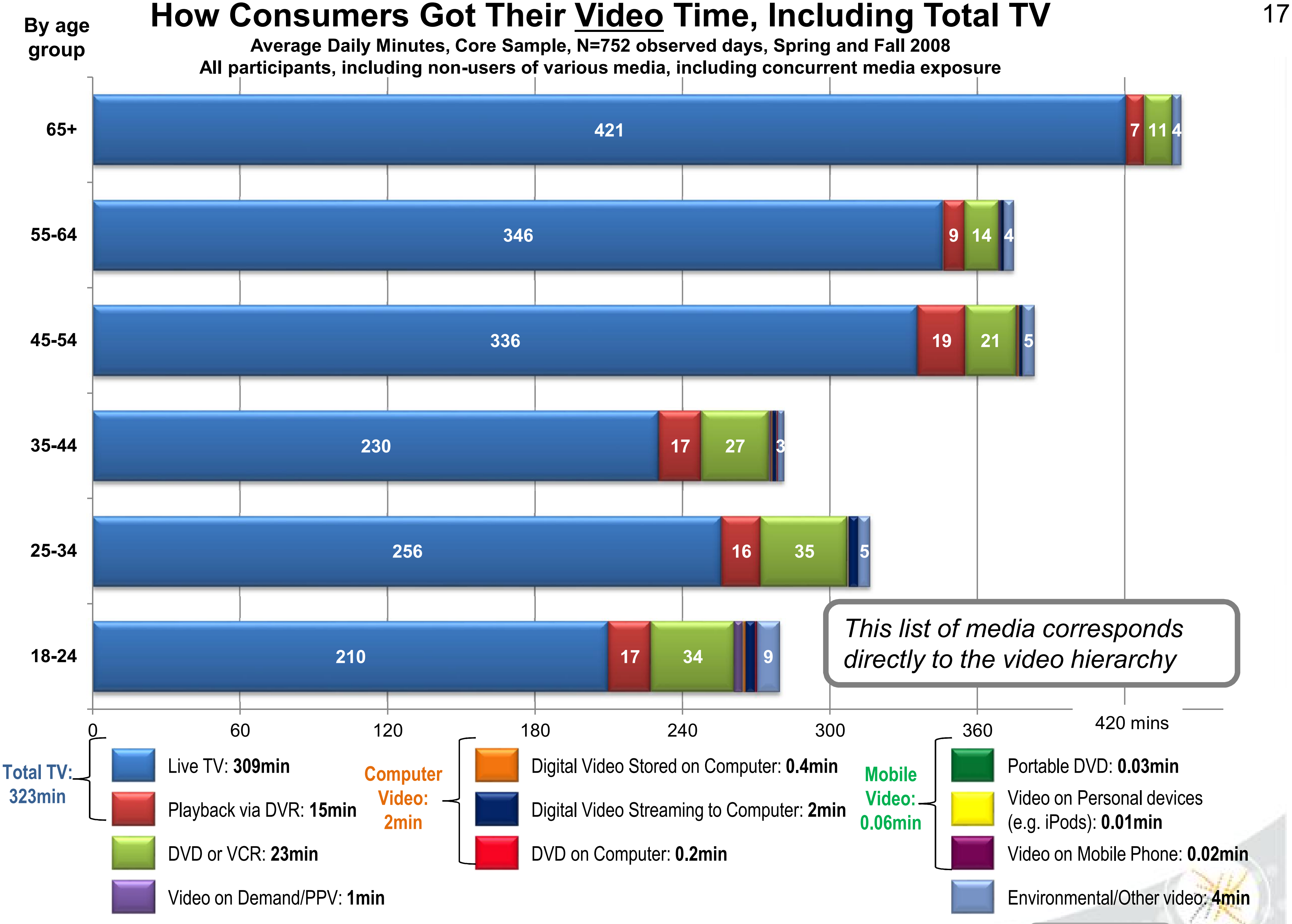
How Consumers Got Their Video Time, Including Total TV

Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure



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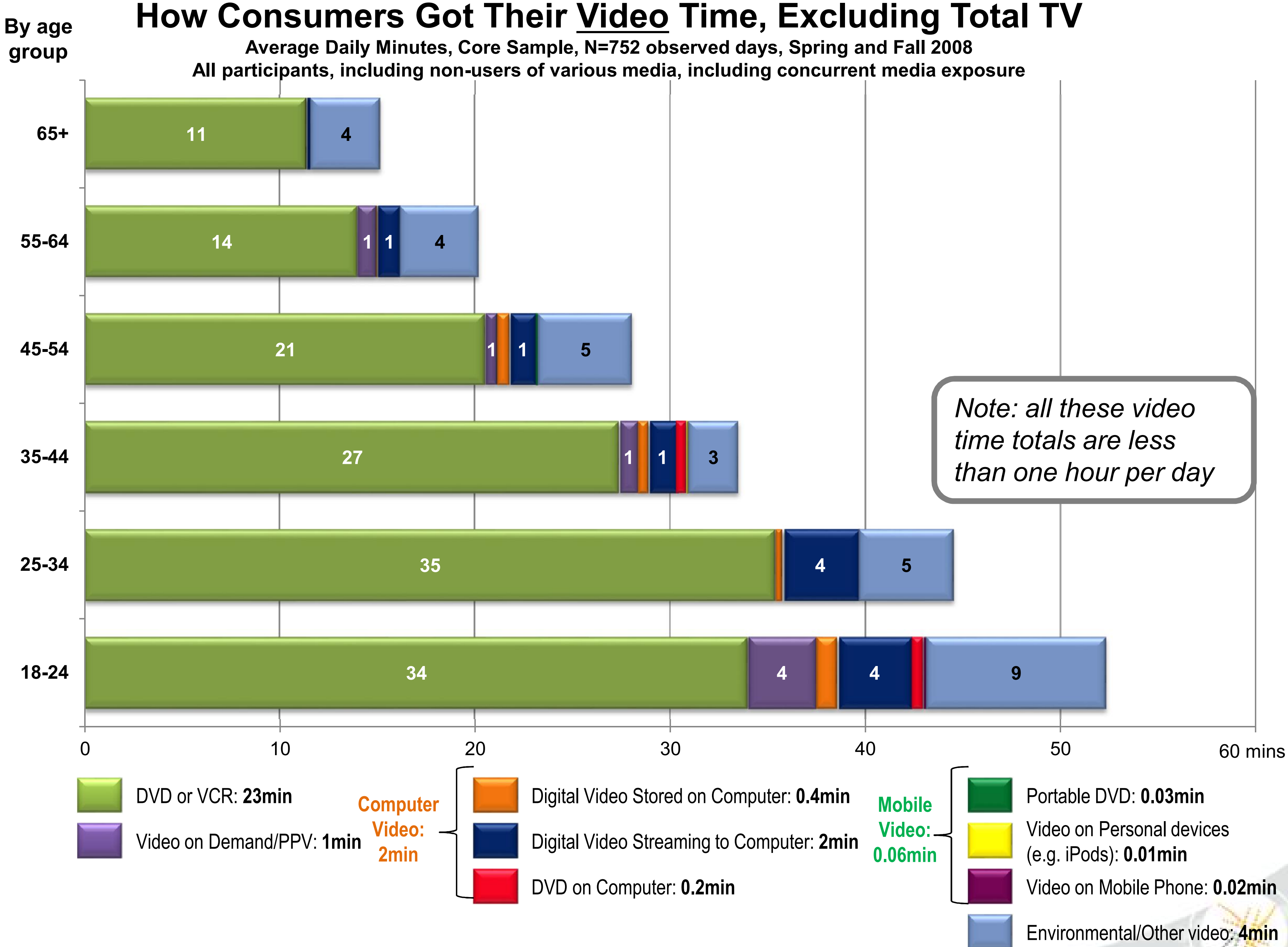
How Consumers Got Their Video Time, Excluding Total TV

Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008

All participants, including non-users of various media, including concurrent media exposure



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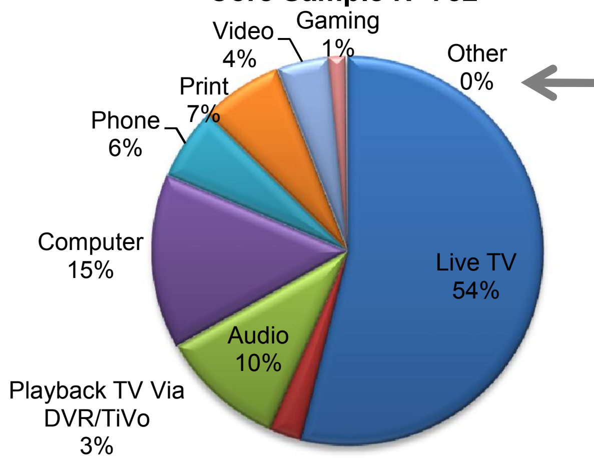
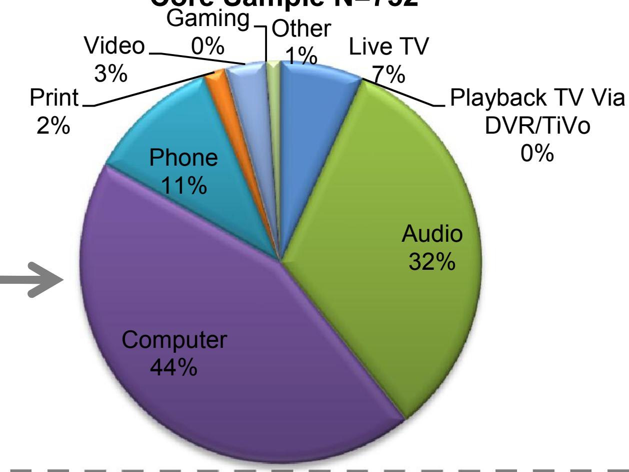
3.

Share Of Media By Location Shows Clear Differences

Share of Media Time at Home
Core Sample N=752



Share of Media Time at Work
Core Sample N=752



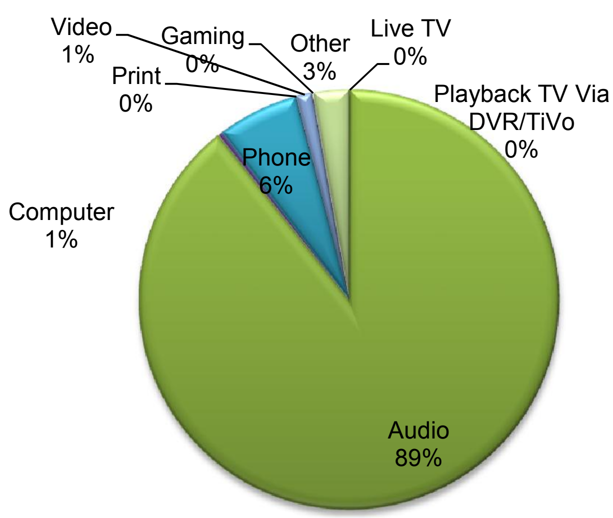
At home media:
Live TV followed by the computer

At work media:
Computer followed by audio

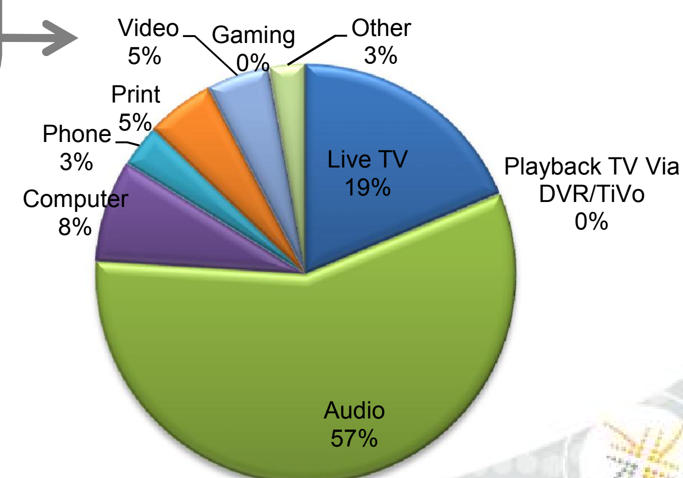
Car:
All about audio

Other locations:
Audio followed by live TV

Share of Media Time in the Car
Core Sample N=752



Share of Media Time in Other Locations
Core Sample N=752



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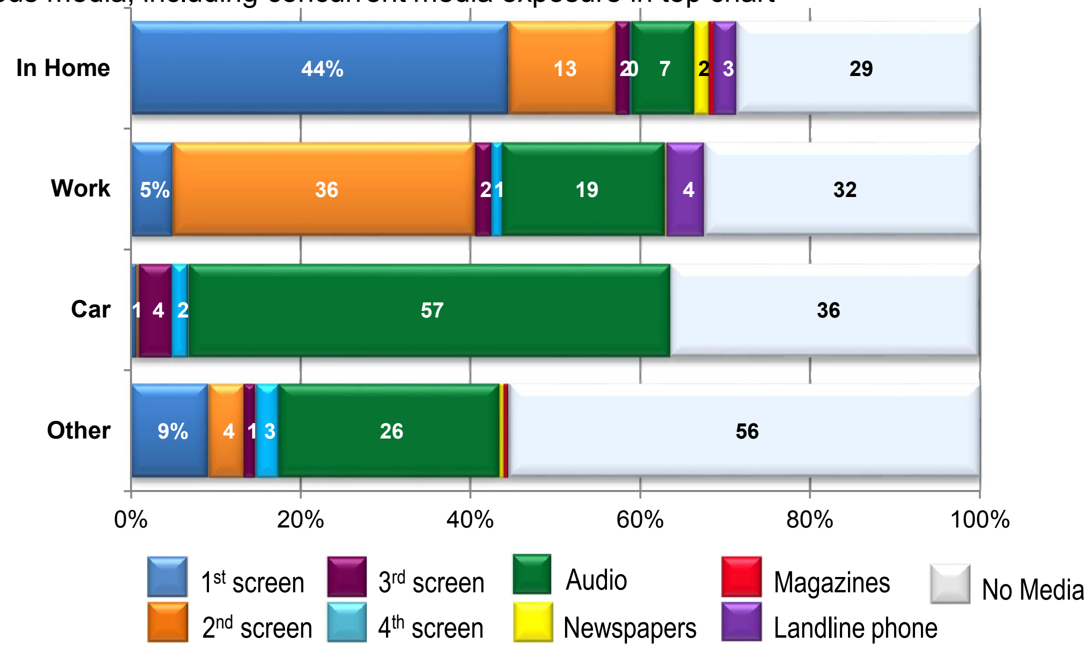
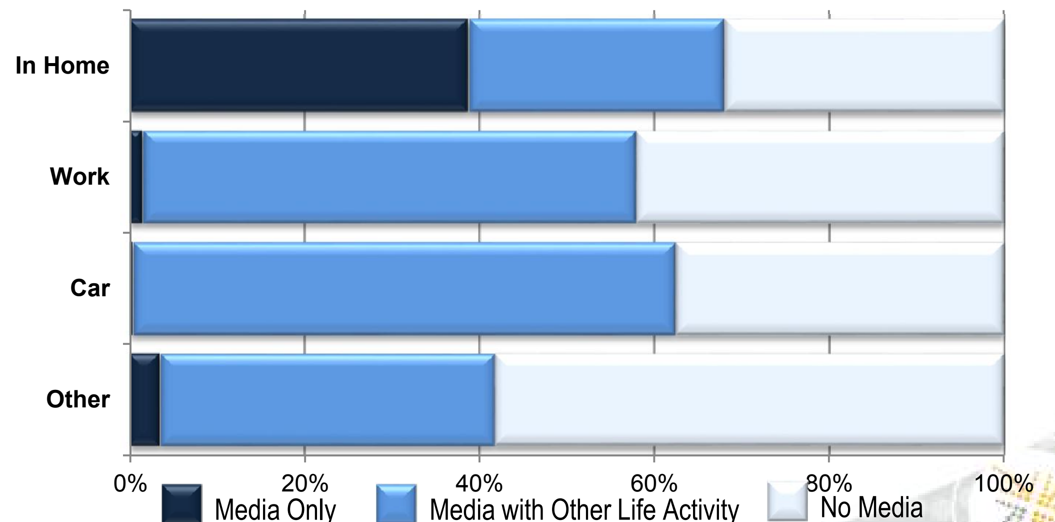
Where Media Was Consumed

Total Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure in top chart

1st screen media exposure was overwhelming in the home, second screen substantially in both the home and at work, audio in all locations, but very disproportionately in the car



Media only activity occurred overwhelmingly in the home. Other locations had less total media, but relatively more media along with other life activities



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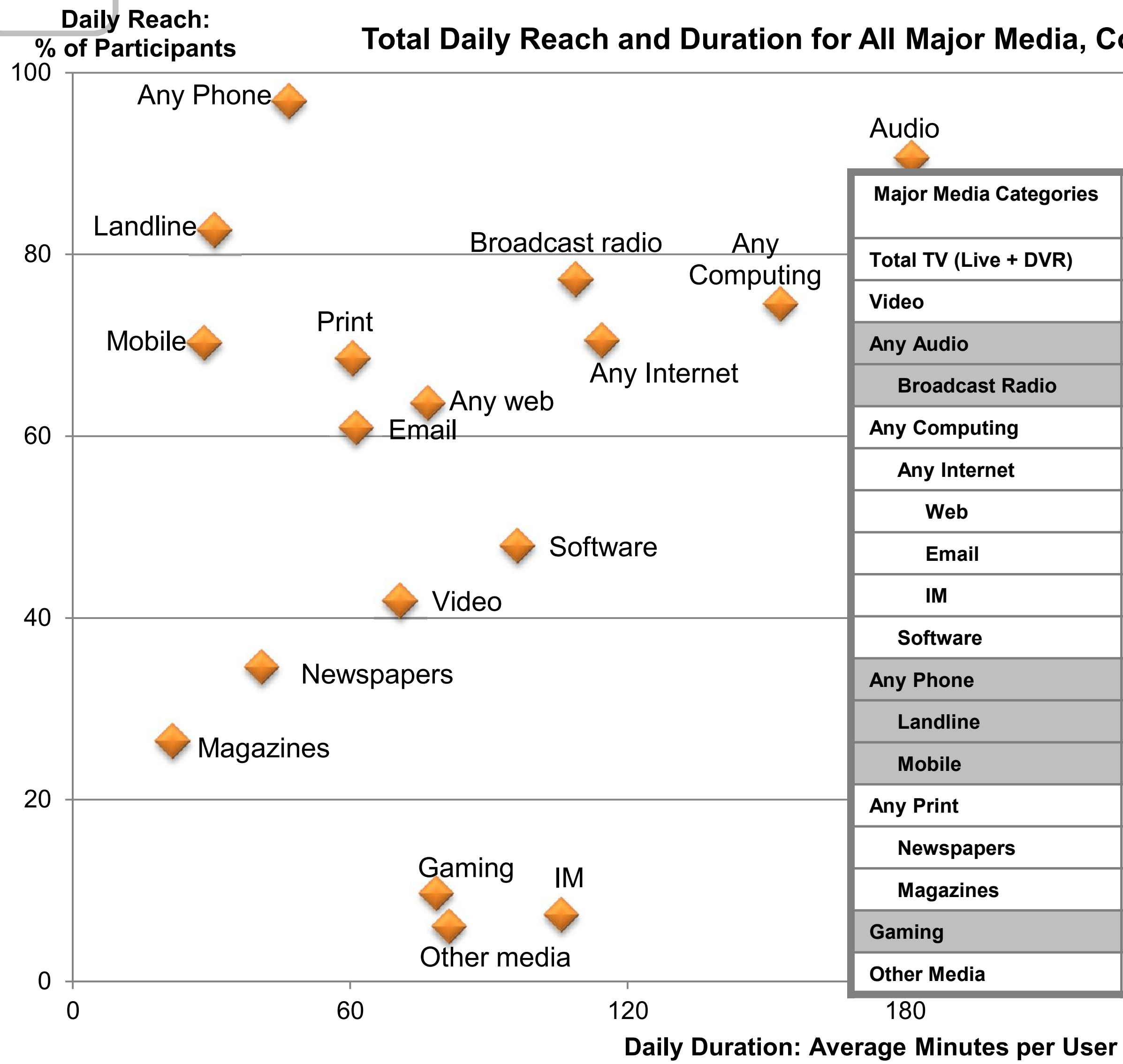
4. TV (Live + DVR) Continued to Dominate Other Media

Total Daily Reach and Duration for All Major Media, Core Sample N=752



Major Media Categories	Daily Reach (%)	Avg. Duration (Mins Per User)	Avg. Duration (Mins Among All)
Total TV (Live + DVR)	94.0	343.9	323.3
Video	41.9	70.9	29.7
Any Audio	90.7	181.2	164.4
Broadcast Radio	77.3	108.7	84.0
Any Computing	74.6	152.9	114.1
Any Internet	70.6	114.3	80.7
Web	63.7	76.6	48.8
Email	61.0	61.3	37.4
IM	47.9	96.2	46.1
Software	7.4	105.7	7.9
Any Phone	96.9	46.7	45.2
Landline	82.7	30.6	25.3
Mobile	70.3	28.5	20.0
Any Print	68.6	60.5	41.5
Newspapers	34.6	40.9	14.1
Magazines	26.5	21.6	5.7
Gaming	9.7	78.7	7.6
Other Media	6.1	81.2	5.0

Contents

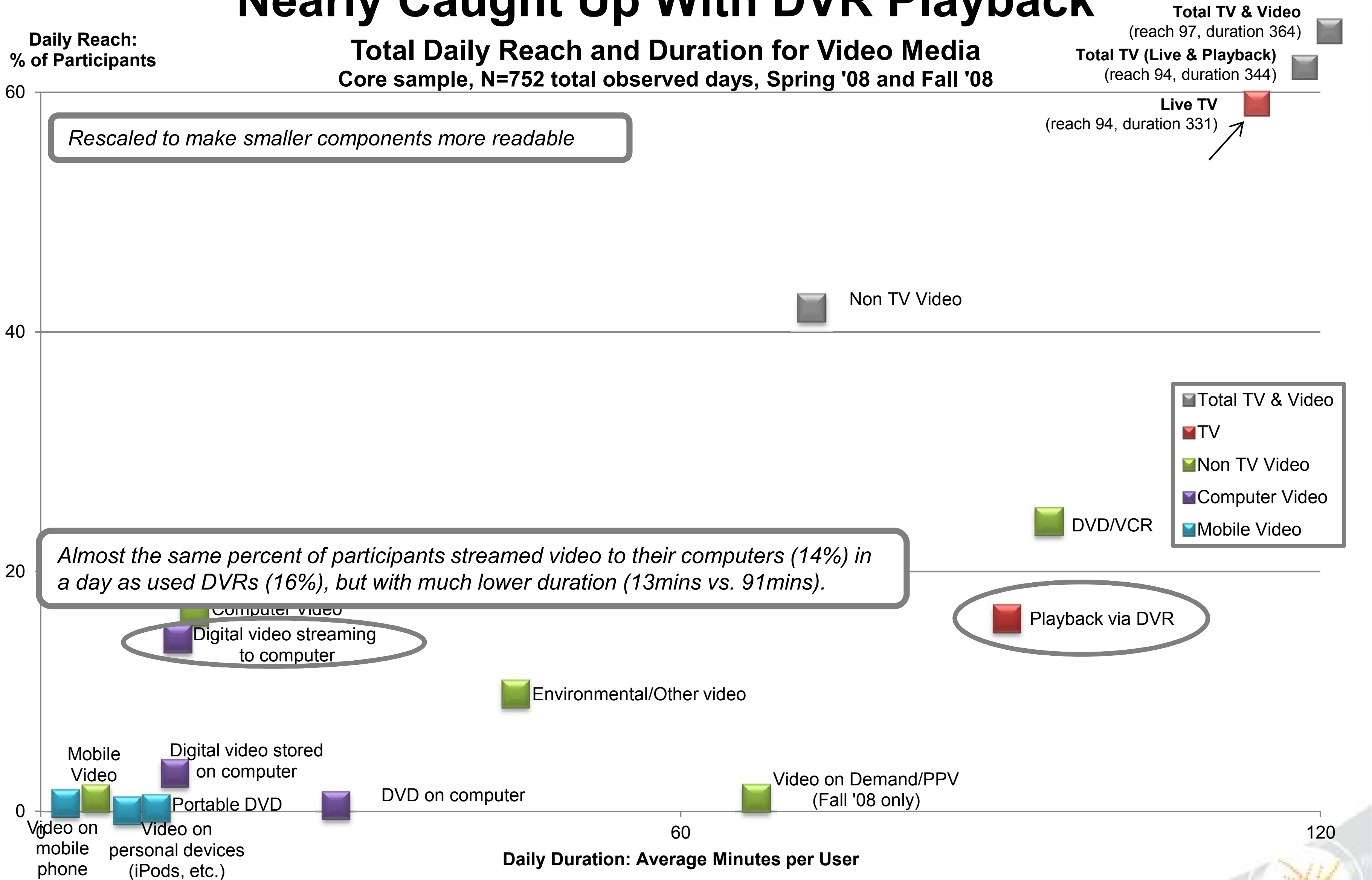
5.

Digital Video Streaming Reach (14%) On Computer Nearly Caught Up With DVR Playback Reach (16%)

- But with only 13 minute duration, the total minutes across adults is very low
- Video on mobile phone was extremely low

Confirmation of earlier research or beliefs	**New information**
Confirms online video is becoming a meaningful media	Online video reach may be higher than might be expected, but average duration lower

Digital Video Streaming Reach Nearly Caught Up With DVR Playback



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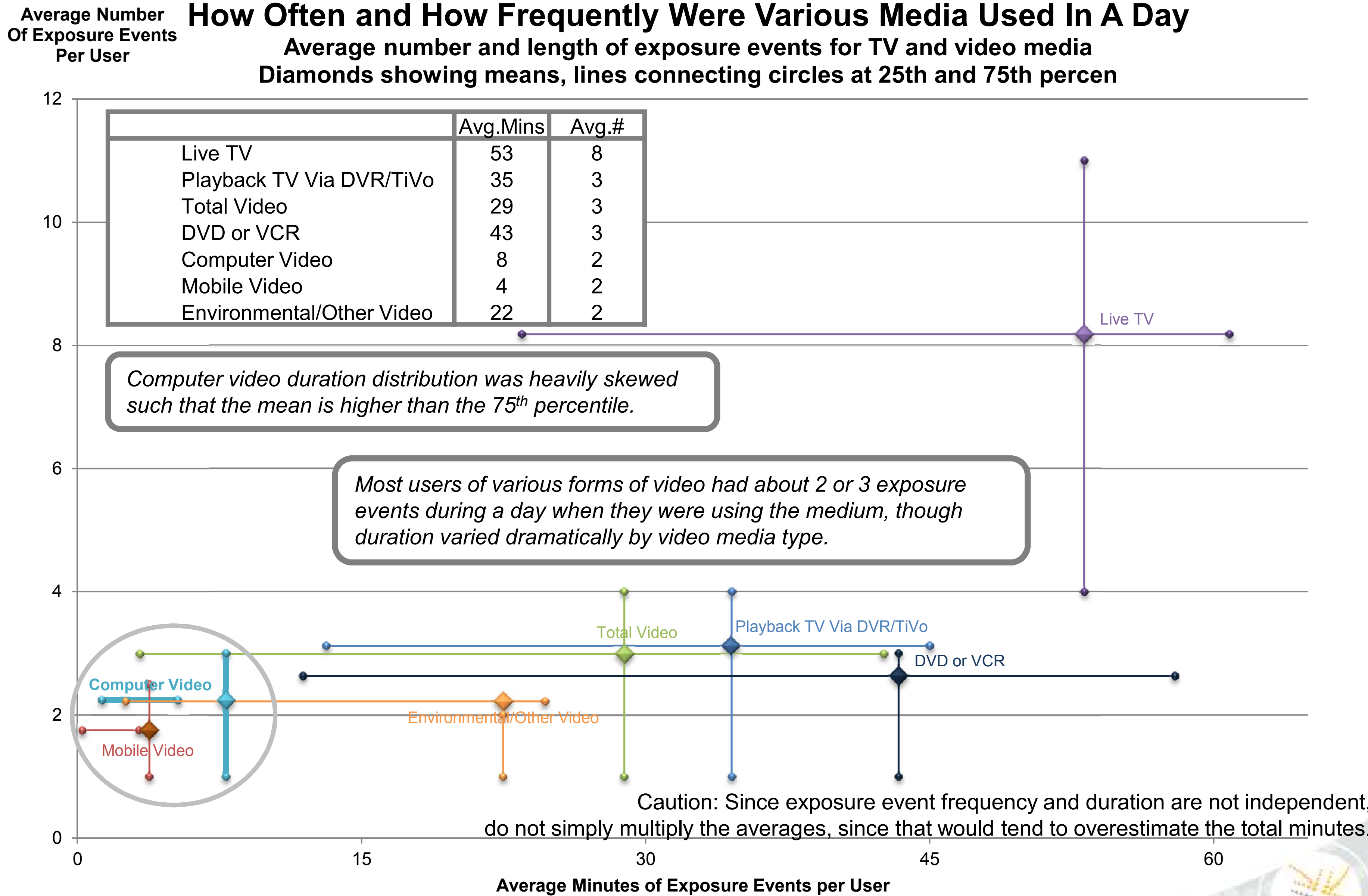
Media Exposure Event Averages And Inter-Quartile Range
How Often and How Frequently Were Various Media Used In A Day

Average number and length of exposure events for TV and video media
Diamonds showing means, lines connecting circles at 25th and 75th percen



	Avg.Mins	Avg.#
Live TV	53	8
Playback TV Via DVR/TiVo	35	3
Total Video	29	3
DVD or VCR	43	3
Computer Video	8	2
Mobile Video	4	2
Environmental/Other Video	22	2

Computer video duration distribution was heavily skewed such that the mean is higher than the 75th percentile.

Most users of various forms of video had about 2 or 3 exposure events during a day when they were using the medium, though duration varied dramatically by video media type.

Caution: Since exposure event frequency and duration are not independent, do not simply multiply the averages, since that would tend to overestimate the total minutes.

Contents

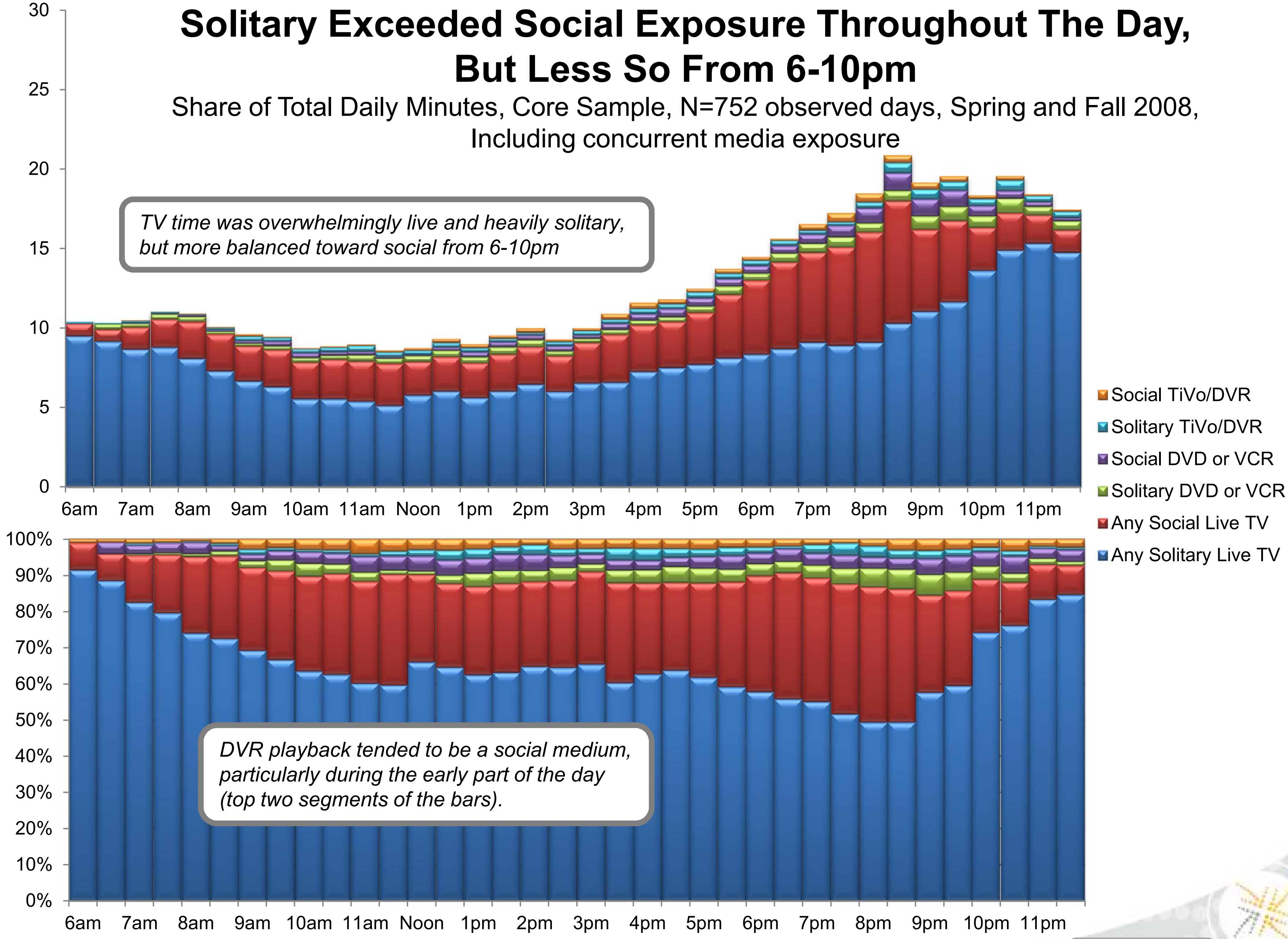
6. Solitary Exposure Of TV Accounted For More Time Than Social Exposure

- And this held true across various groups by marital status and number of children in the household.

Confirmation of earlier research or beliefs	**New information**
People meter data presumably has extensive detail on this	

Solitary Exceeded Social Exposure Throughout The Day, But Less So From 6-10pm

Share of Total Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008, Including concurrent media exposure



TV time was overwhelmingly live and heavily solitary, but more balanced toward social from 6-10pm

DVR playback tended to be a social medium, particularly during the early part of the day (top two segments of the bars).

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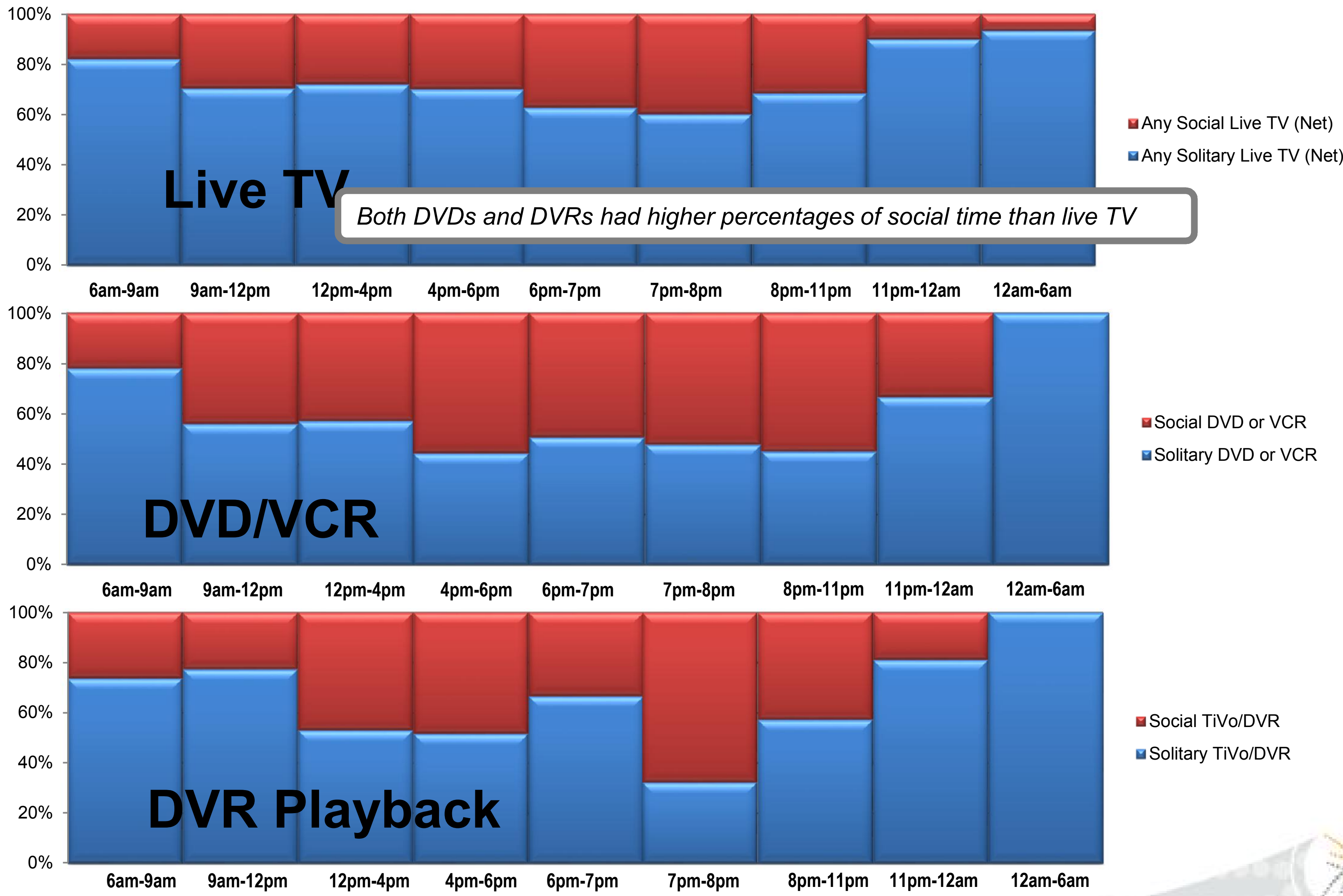
Live TV, DVD, And DVR Solitary Vs. Social Patterns Differed



Both DVDs and DVRs had higher percentages of social time than live TV

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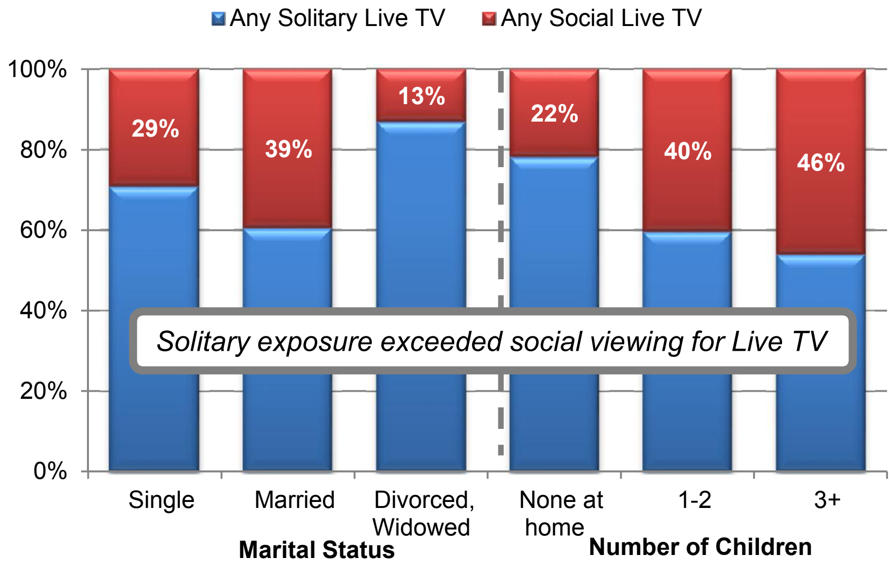
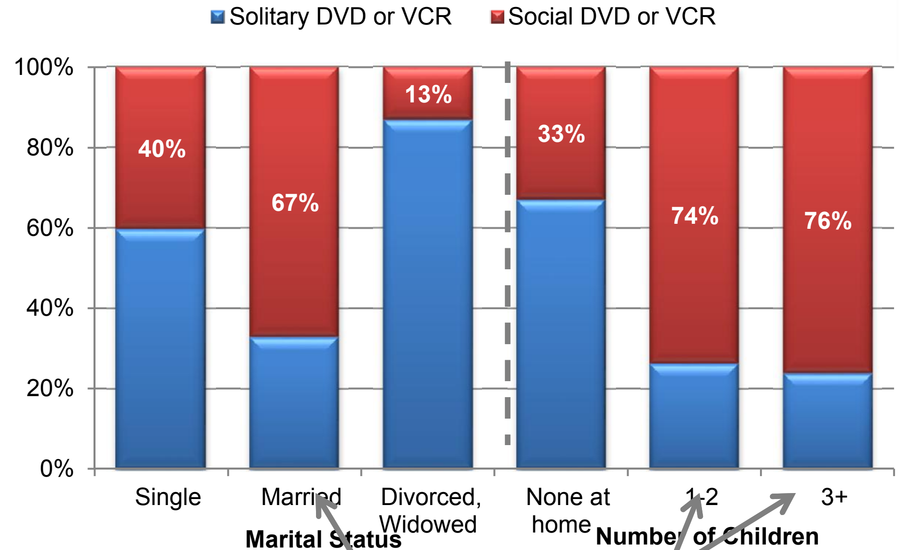
Solitary Vs. Social Viewing Differed By Media and Household Sizes

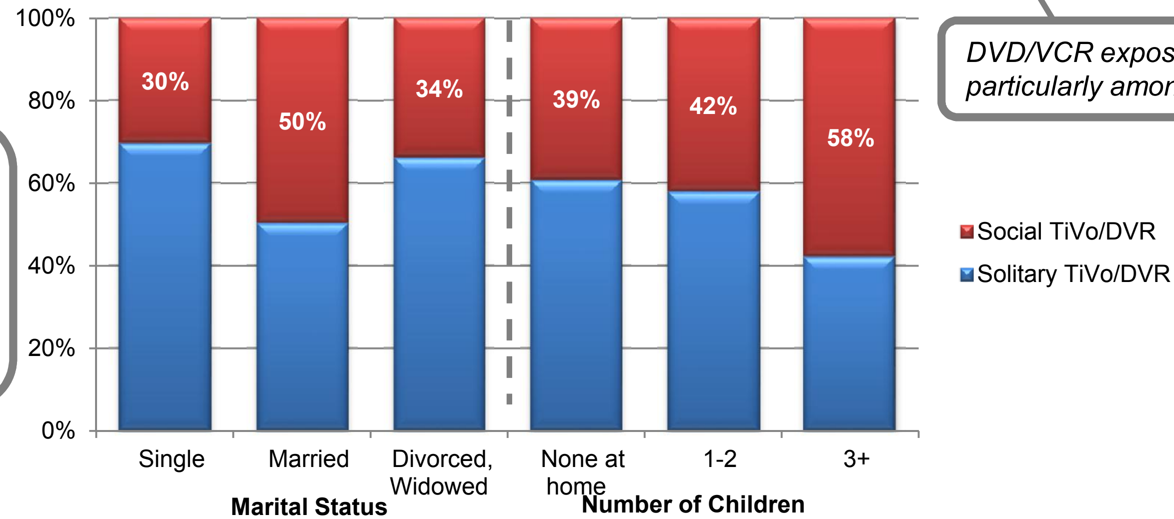


Solitary exposure exceeded social viewing for Live TV



DVD/VCR exposure was more social, particularly among married or with children

DVR exposure was generally close to equal solitary vs. social exposure, except for single person HHs



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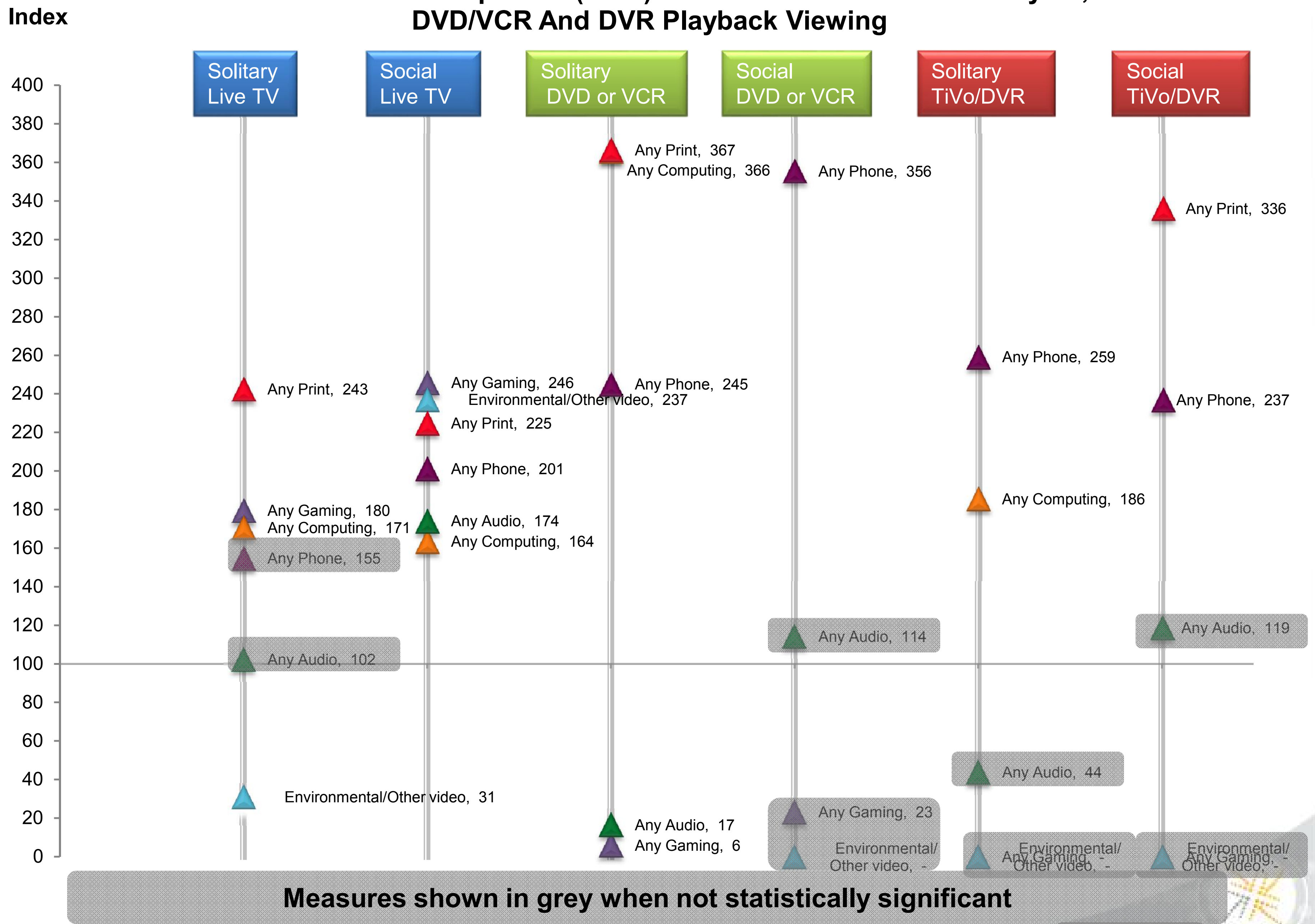
Concurrent Media Exposure (CME) Indices For Social Vs. Solitary TV, DVD/VCR And DVR Playback Viewing



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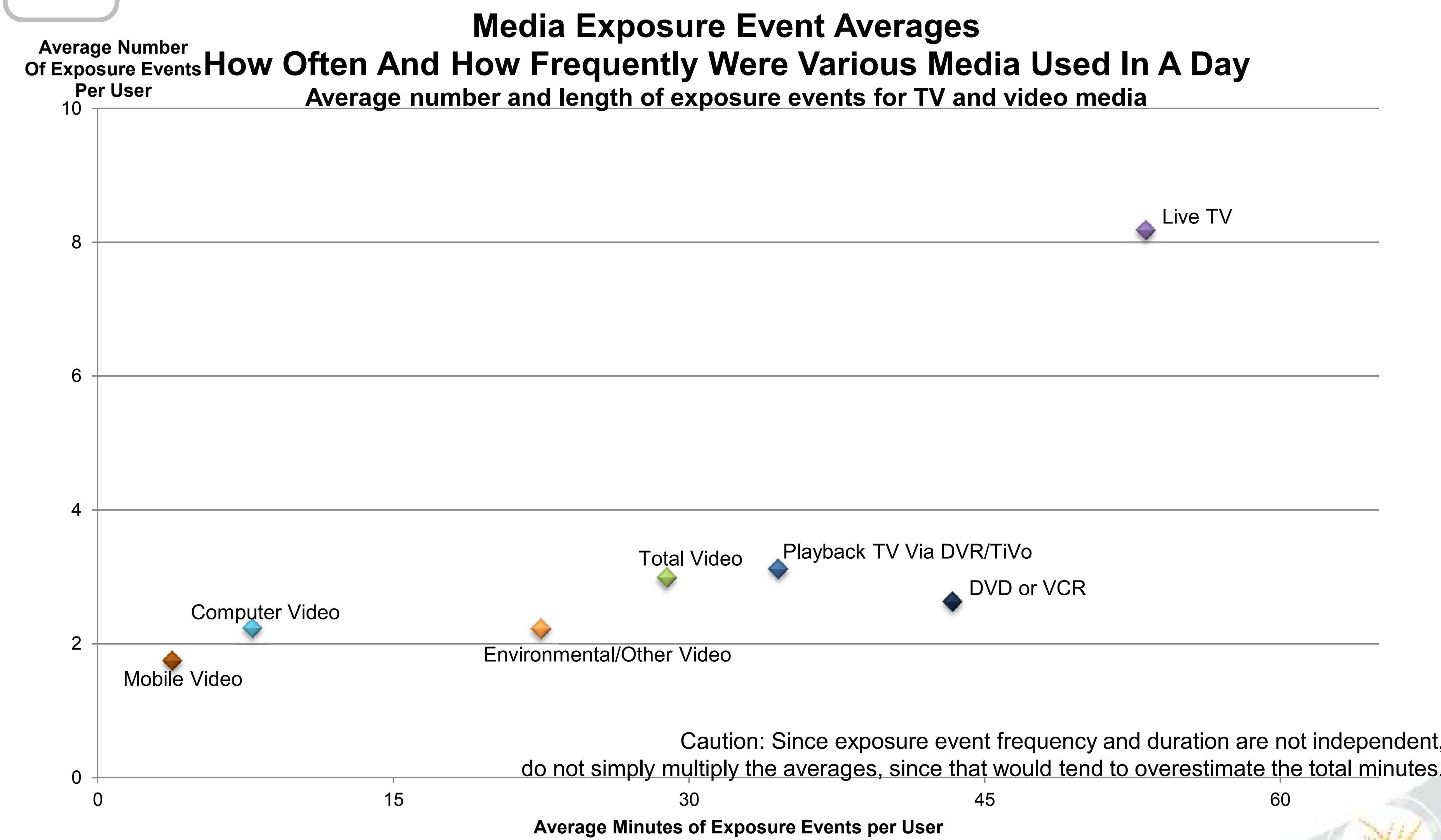
7. Media Exposure Events



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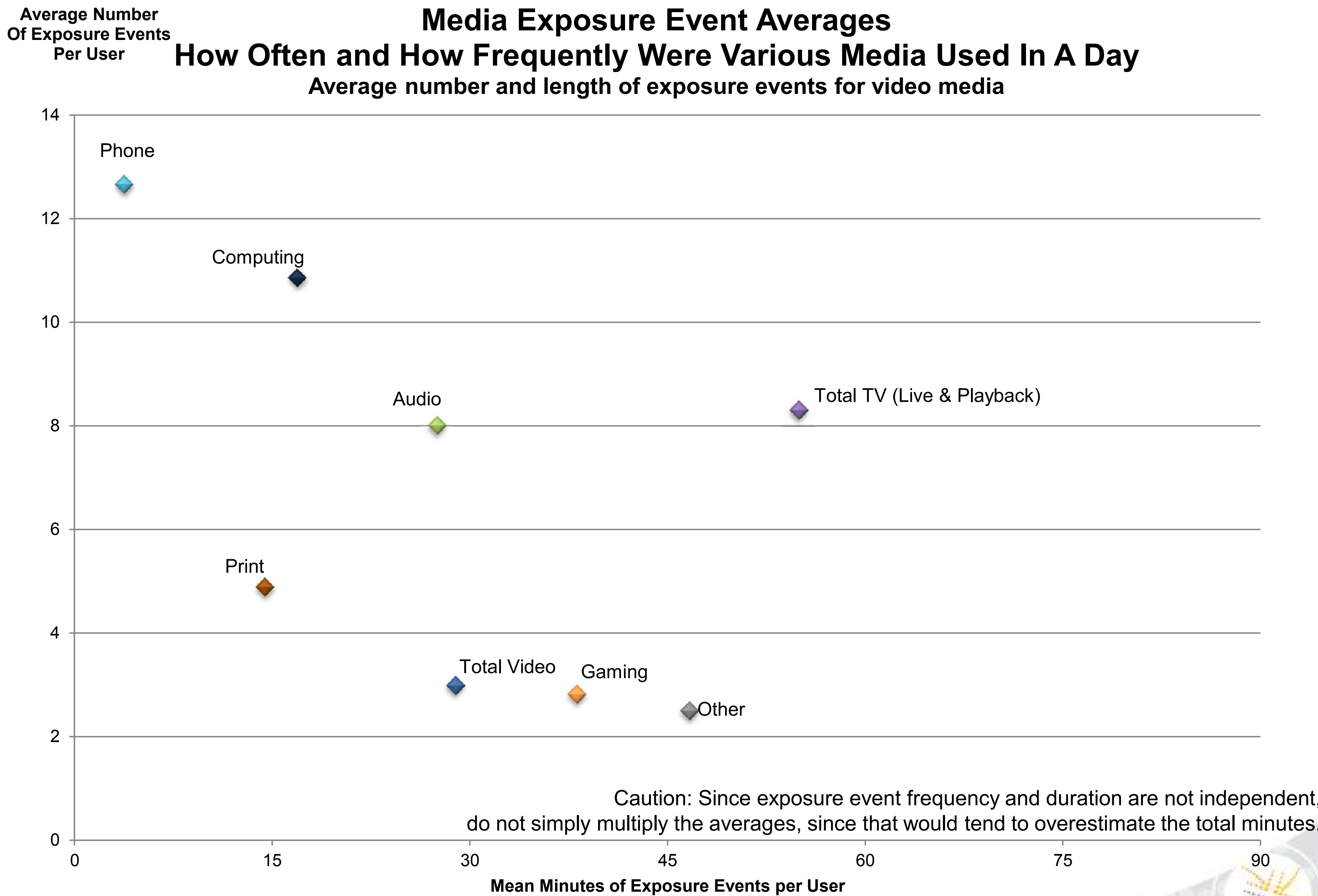
Media Exposure Event Averages
How Often and How Frequently Were Various Media Used In A Day
Average number and length of exposure events for video media



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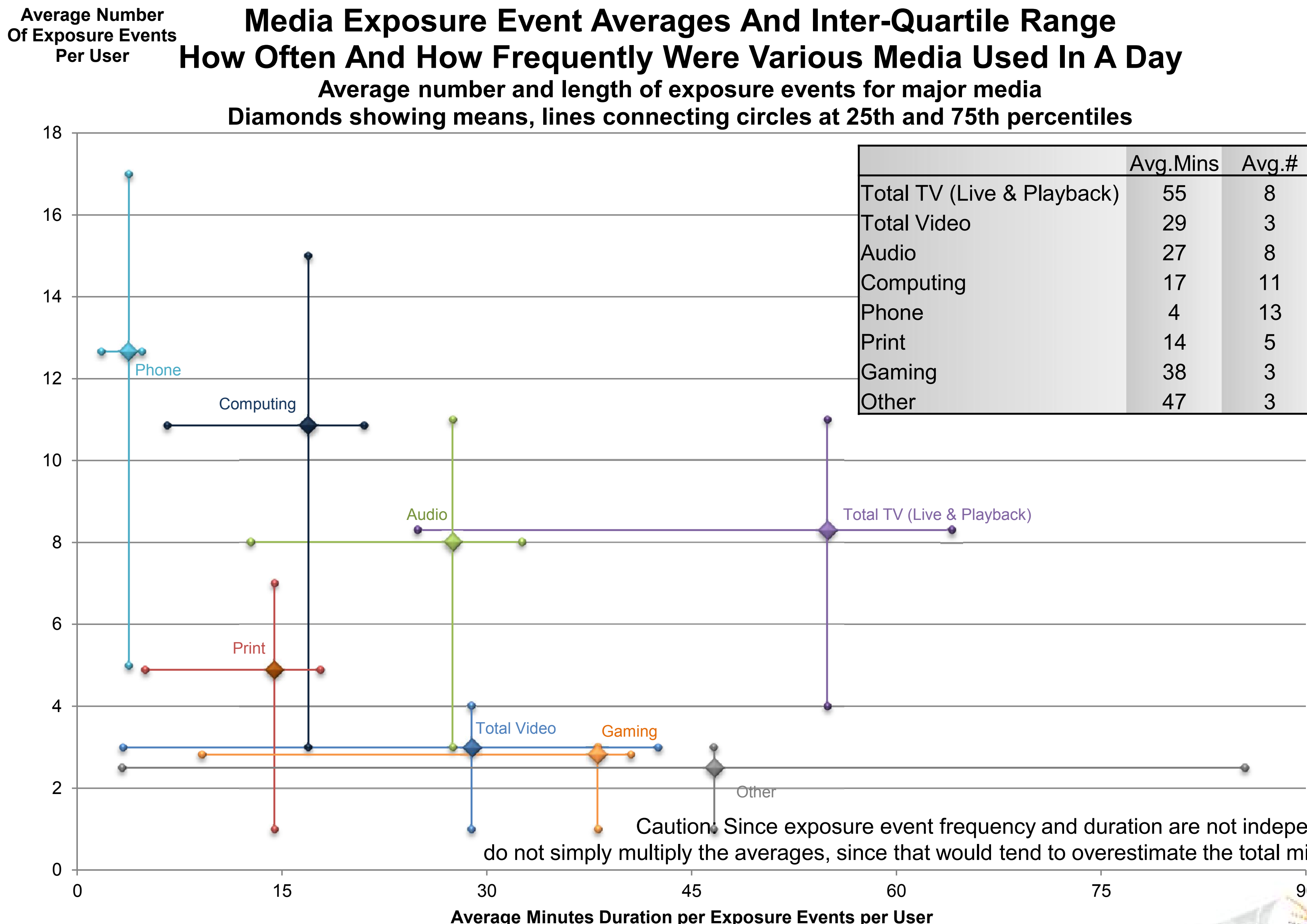
Media Exposure Event Averages And Inter-Quartile Range
How Often And How Frequently Were Various Media Used In A Day

Average number and length of exposure events for major media
Diamonds showing means, lines connecting circles at 25th and 75th percentiles



	Avg.Mins	Avg.#
Total TV (Live & Playback)	55	8
Total Video	29	3
Audio	27	8
Computing	17	11
Phone	4	13
Print	14	5
Gaming	38	3
Other	47	3

Caution: Since exposure event frequency and duration are not independent, do not simply multiply the averages, since that would tend to overestimate the total minutes.

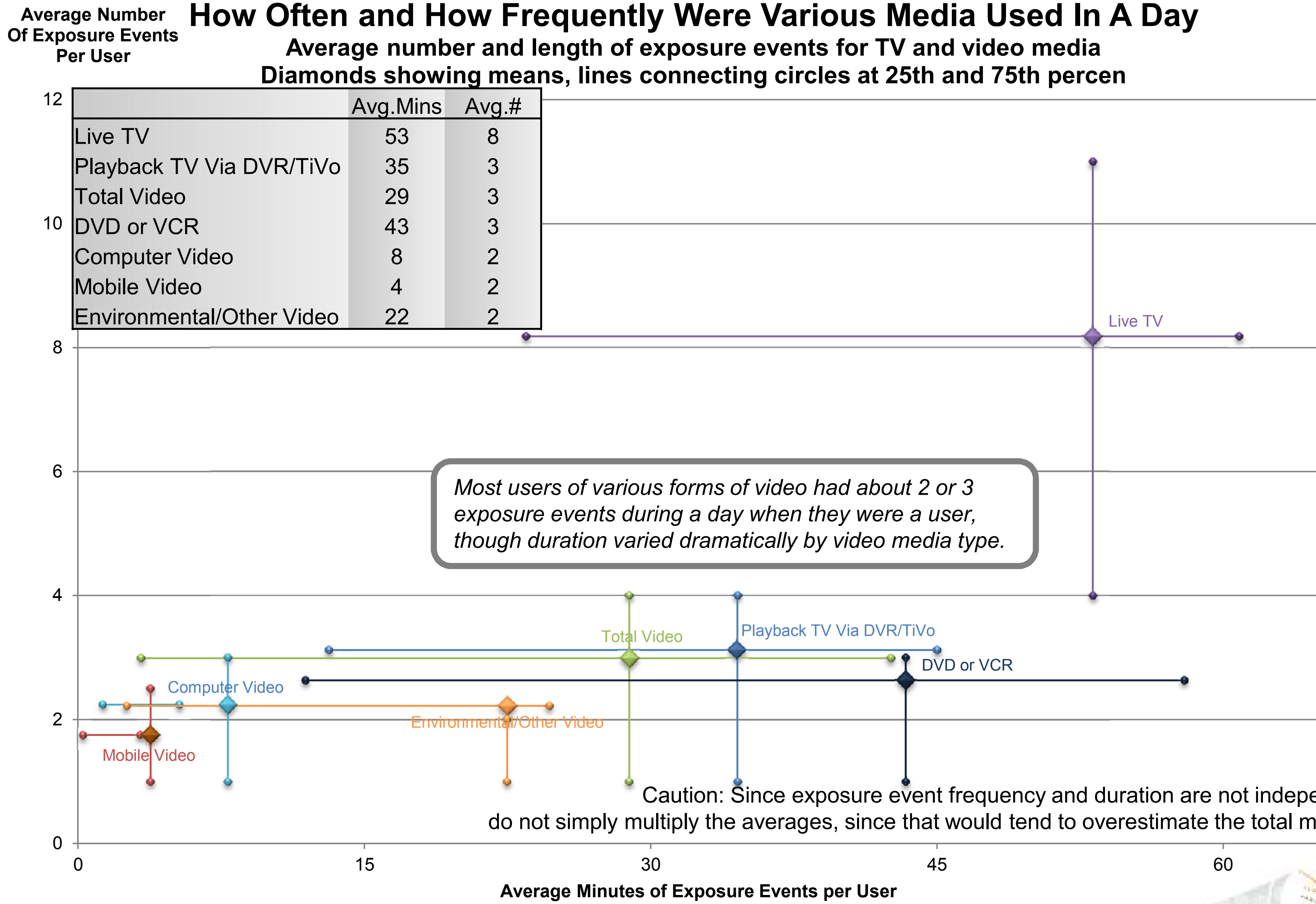
Contents

Media Exposure Event Averages And Inter-Quartile Range

How Often and How Frequently Were Various Media Used In A Day

Average number and length of exposure events for TV and video media
Diamonds showing means, lines connecting circles at 25th and 75th percen

	Avg.Mins	Avg.#
Live TV	53	8
Playback TV Via DVR/TiVo	35	3
Total Video	29	3
DVD or VCR	43	3
Computer Video	8	2
Mobile Video	4	2
Environmental/Other Video	22	2



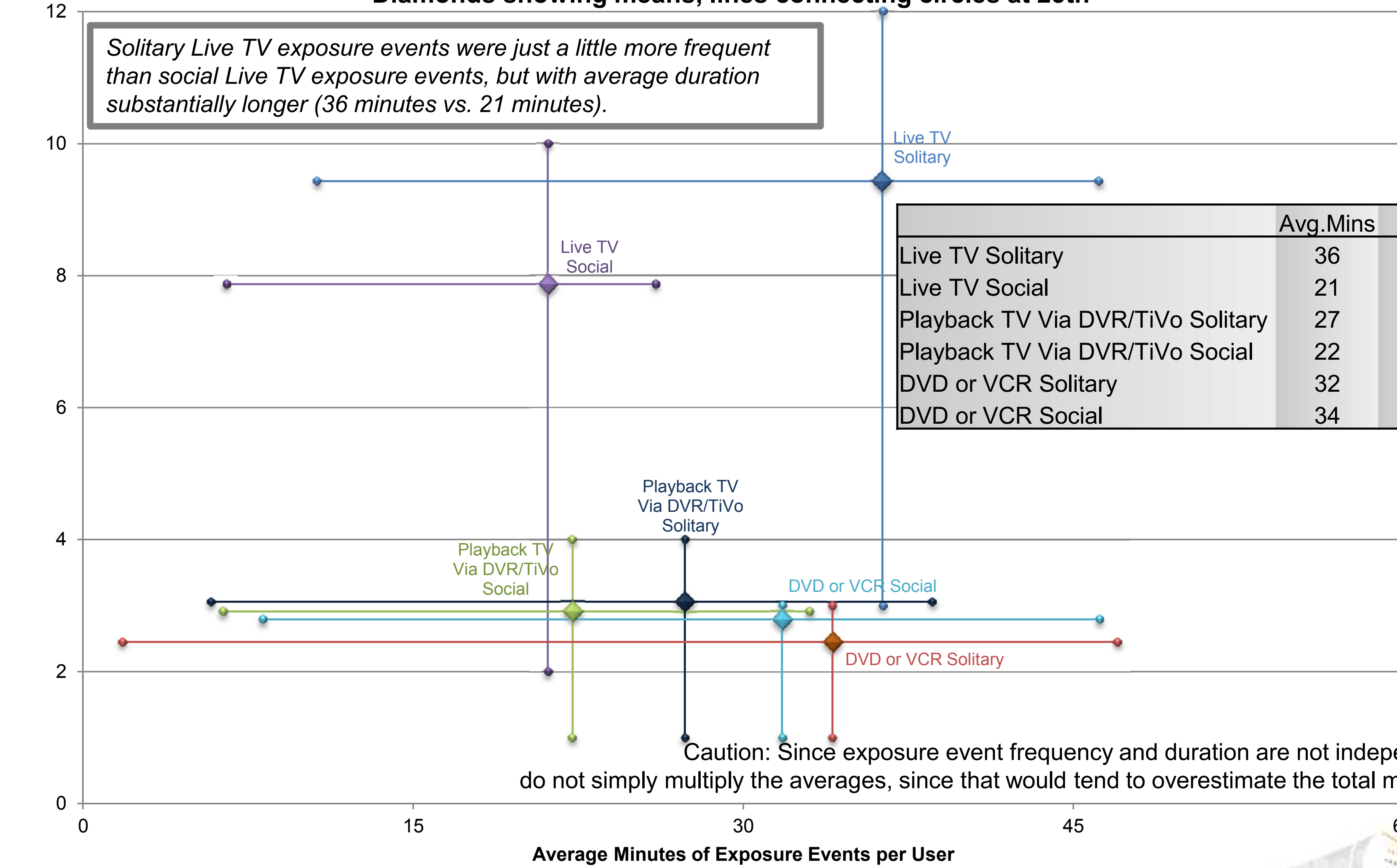
Most users of various forms of video had about 2 or 3 exposure events during a day when they were a user, though duration varied dramatically by video media type.

Caution: Since exposure event frequency and duration are not independent, do not simply multiply the averages, since that would tend to overestimate the total minutes.

Contents

Media Exposure Event Averages And Inter-Quartile Range
How Often And How Frequently Are Various Media Used In A Day
Average number and length of exposure events for social vs. solitary TV video media
Diamonds showing means, lines connecting circles at 25th

Solitary Live TV exposure events were just a little more frequent than social Live TV exposure events, but with average duration substantially longer (36 minutes vs. 21 minutes).

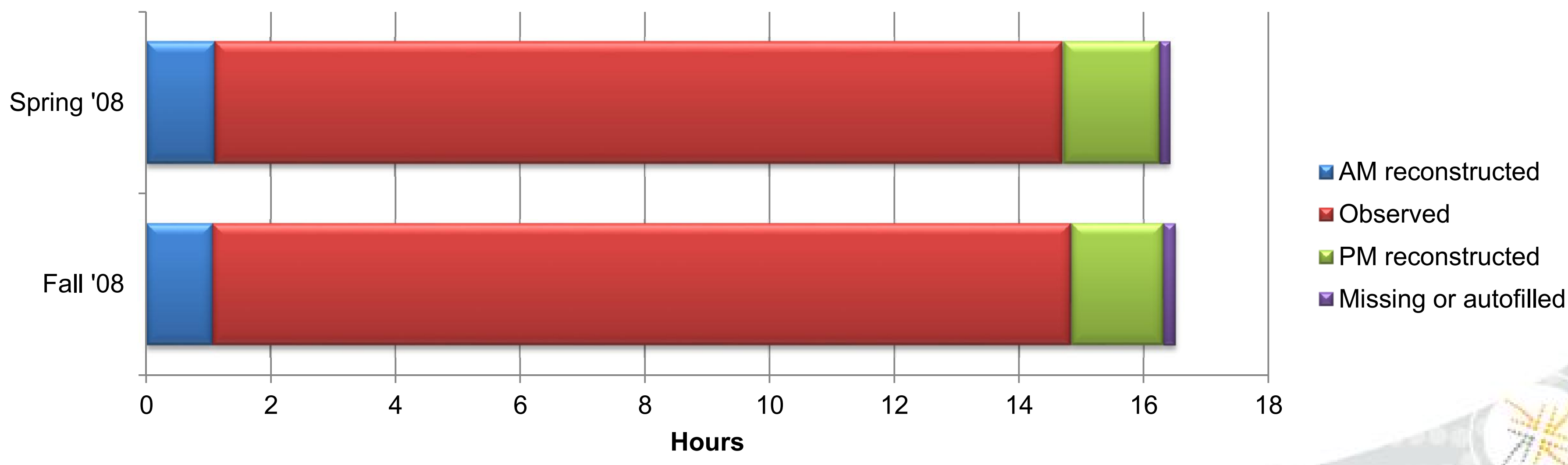


	Avg.Mins	Avg.#
Live TV Solitary	36	9
Live TV Social	21	8
Playback TV Via DVR/TiVo Solitary	27	3
Playback TV Via DVR/TiVo Social	22	3
DVD or VCR Solitary	32	3
DVD or VCR Social	34	2

Caution: Since exposure event frequency and duration are not independent, do not simply multiply the averages, since that would tend to overestimate the total minutes.

8. Data Covered The Waking Day Quite Comprehensively And Consistently

	Spring '08 Overall	Spring '08 Men	Spring '08 Women	Fall '08 Overall	Fall '08 Men	Fall '08 Women
Average start time	6:45 am	6:38 am	6:50 am	6:44 am	6:43 am	6:45 am
Average end time	11:09 pm	11:15 pm	11:04 pm	11:15 pm	11:13 pm	11:16 pm
Average day length	16.4 hrs	16.6 hrs	16.2 hrs	16.5 hrs	16.5 hrs	16.5 hrs
AM reconstruction	1.1 hrs	1.1 hrs	1.1 hrs	1.1 hrs	1.1 hrs	1.0 hrs
Observed	13.6	13.6	13.6	13.8	13.8	13.8
PM reconstruction	1.5	1.7	1.4	1.5	1.5	1.5
Missing or autofilled	0.2	0.2	0.2	0.2	0.2	0.2



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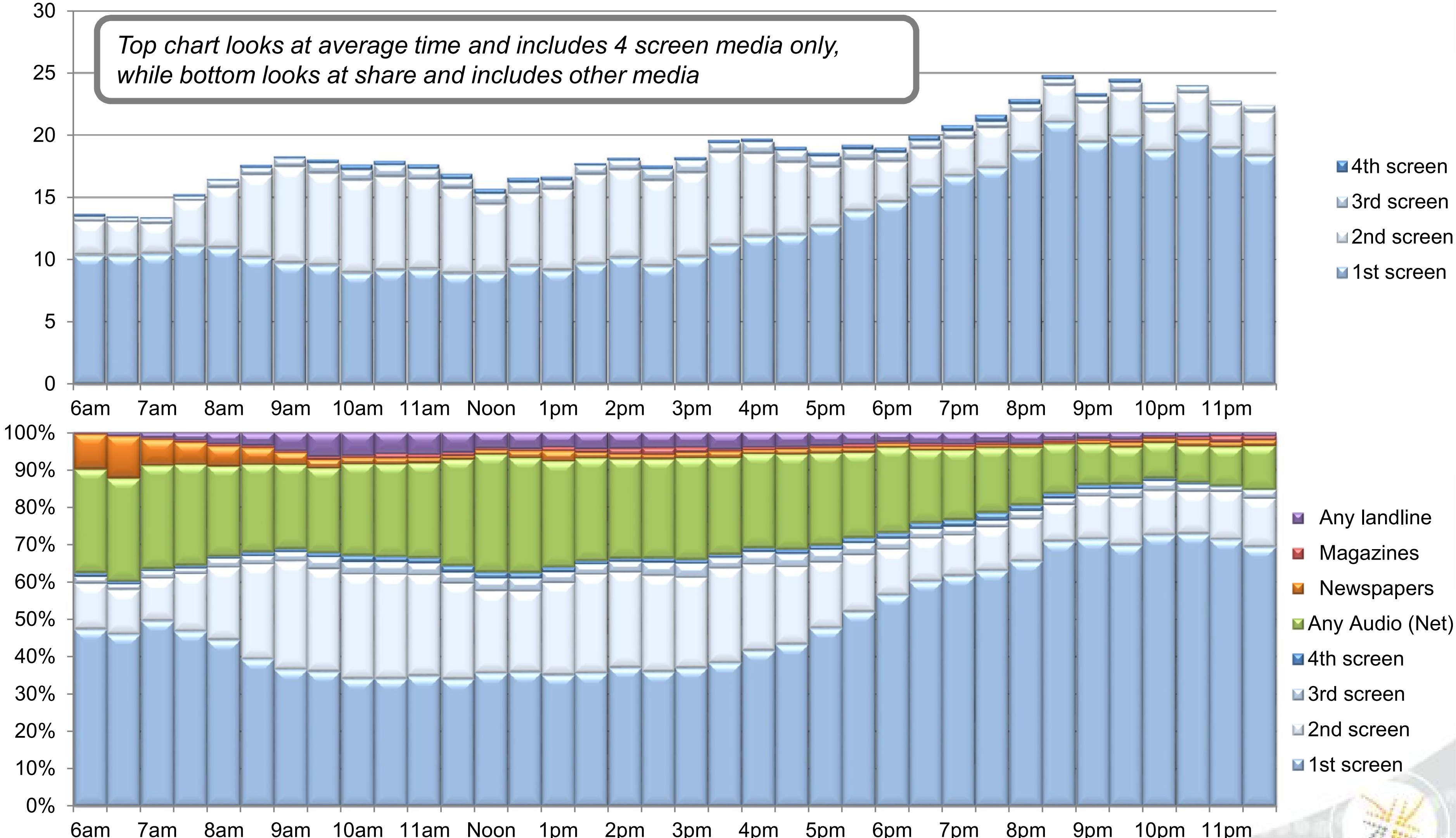
Which Media Were Consumed When: 4 Screens With And Without Other Media

Share of Total Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008, Including concurrent media exposure

Top chart looks at average time and includes 4 screen media only, while bottom looks at share and includes other media



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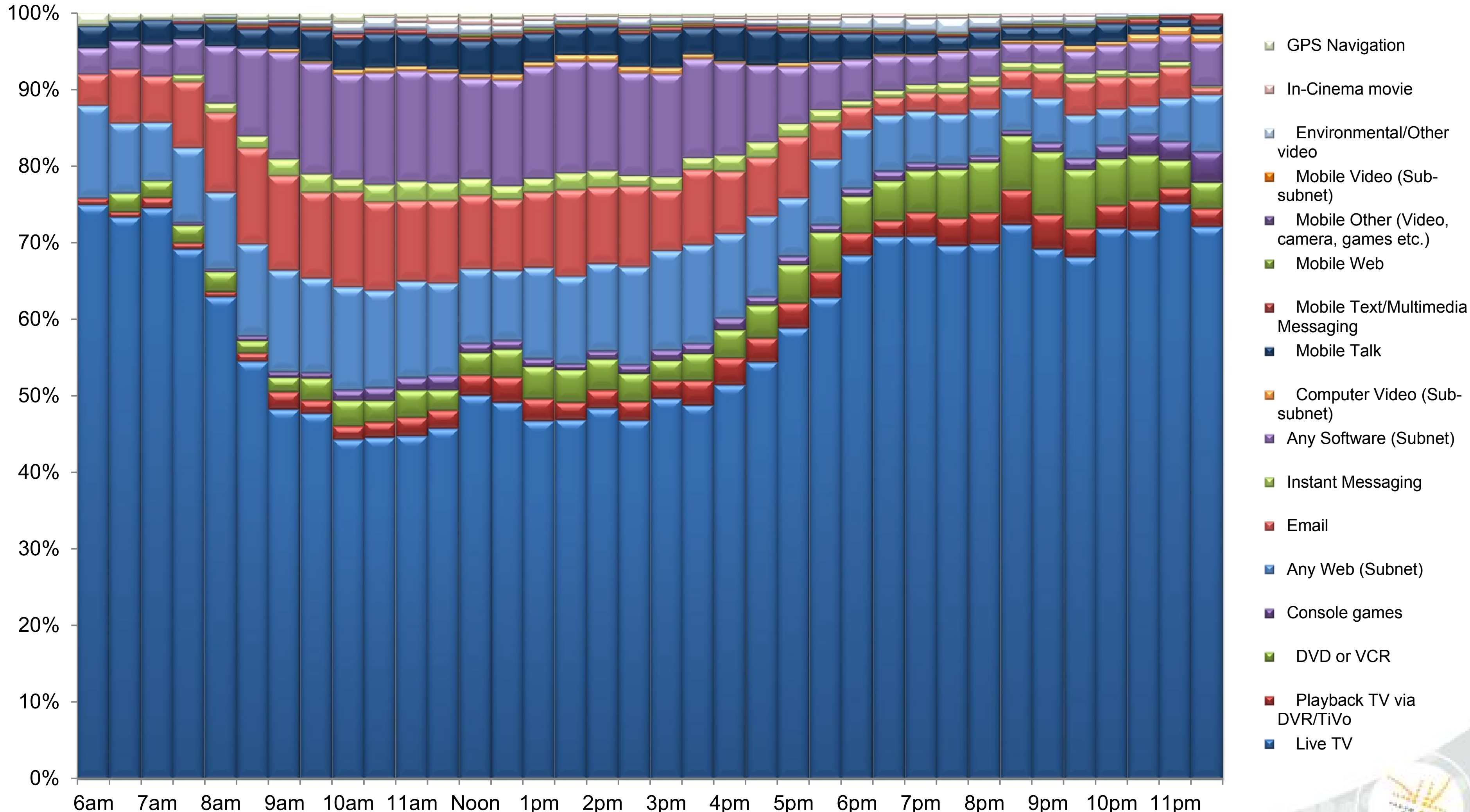
Which Media Were Consumed When: 4 Screen Detail
How Total Media Time Was Split By Half Hour

Share of Total Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008, Including concurrent media exposure



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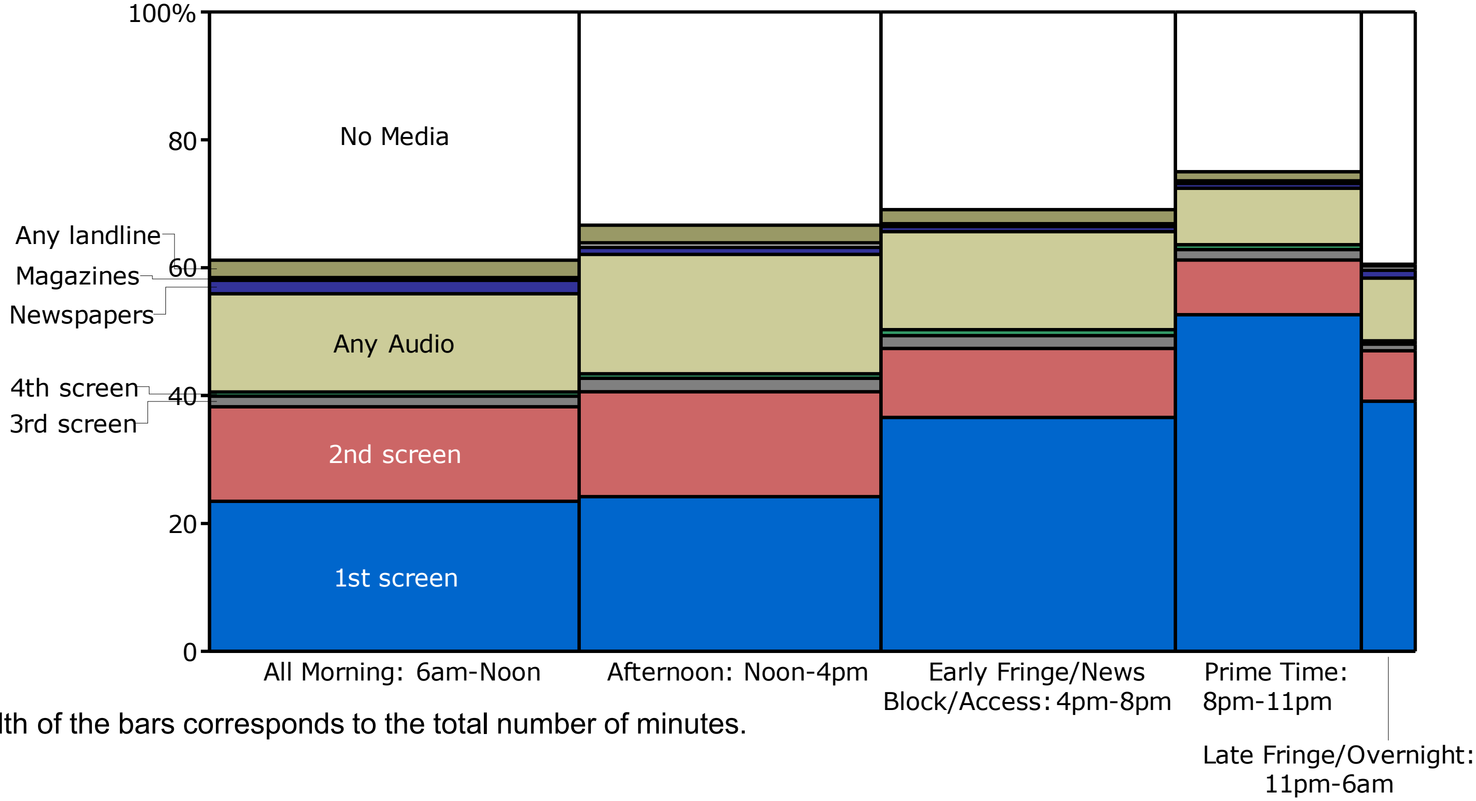
Daypart Media Share Differences Were Driven Largely By Heavy TV And Video Exposure In The Evening

When media was consumed how total media time was split by day part
Share of Total Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008, Including concurrent media exposure



The width of the bars corresponds to the total number of minutes.

	All Morning: 6am-Noon	Afternoon: Noon-4pm	Early Fringe/News Block/Access: 4pm-8pm	Prime Time: 8pm-11pm	Late Fringe/Overnight: 11pm-6am
% Total Media Mins/ Total Observed Mins	57%	62%	65%	73%	59%

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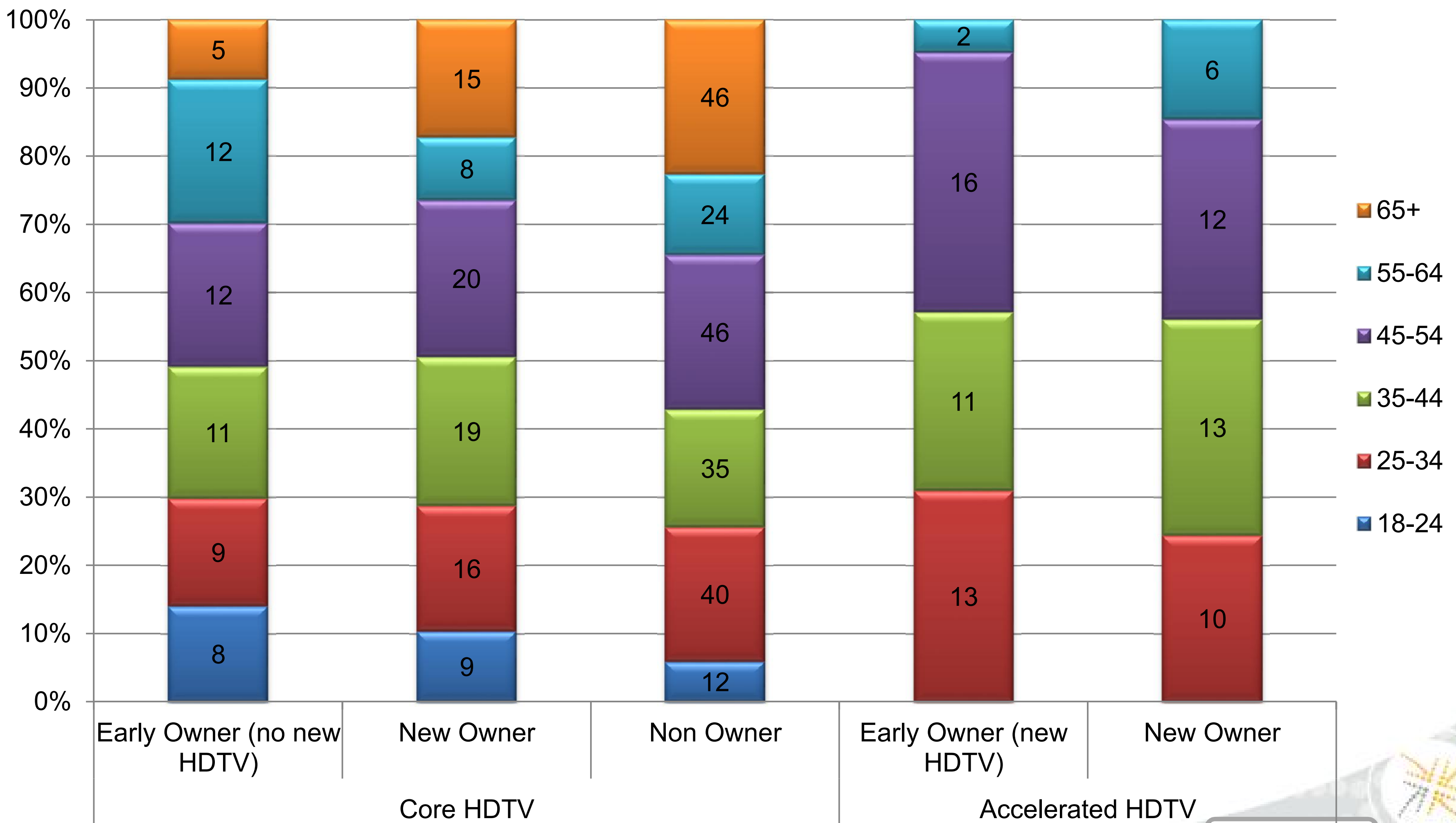
9. HDTV Data

HDTV Ownership By Age Group

Number of individuals in each segment representing sample size



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HDTV Ownership Groups Were Key To The Analysis

- Several cells had sample sizes too small, but enough groups remained for numerous key comparisons

Spring vs. Fall Ownership	Name of group	Core Sample	Accelerated Sample
1 - 2+	Early Owners (New HDTV)	No N=17 (Note: Small sample)	Yes N=42
1 - 1	Early Owners (No New HDTV)	Yes N=58	No N=6
0 - 1	New Owners	Yes N=87	Yes N=43
0 – 0	Non Owners	Yes N=205	No N=6

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No HDTV Ownership Effect On Total Media Mins

		Early owners w/addl HDTV	Early owners no addl HDTV	New HDTV owners	Non-HDTV owners
	(N=)	Too small	(58)	(87)	(205)
Core	**Spring 2008**		631	615	613
	Fall 2008		629	612	622
	Increase/Decrease		-2	-3	9
	%		-0.3%	-0.5%	+2%
Accelerated	(N=)	(42)	Too small	(43)	Too small
	Spring 2008	589		597	
	Fall 2008	632		633	
	Increase/Decrease	43		37	
	%	+7%		+6%	

Conclusions:

1. Total media minutes (within either group, mins or pct) showed no difference by HDTV ownership group
2. However total media minutes did increase for the Accelerated group from Spring vs. Fall by 6-7%

Contents

In The Core Sample, The Effects Of HDTV On Increased Live TV Mins By Ownership Group Are Clear, With Or Without Sports Included

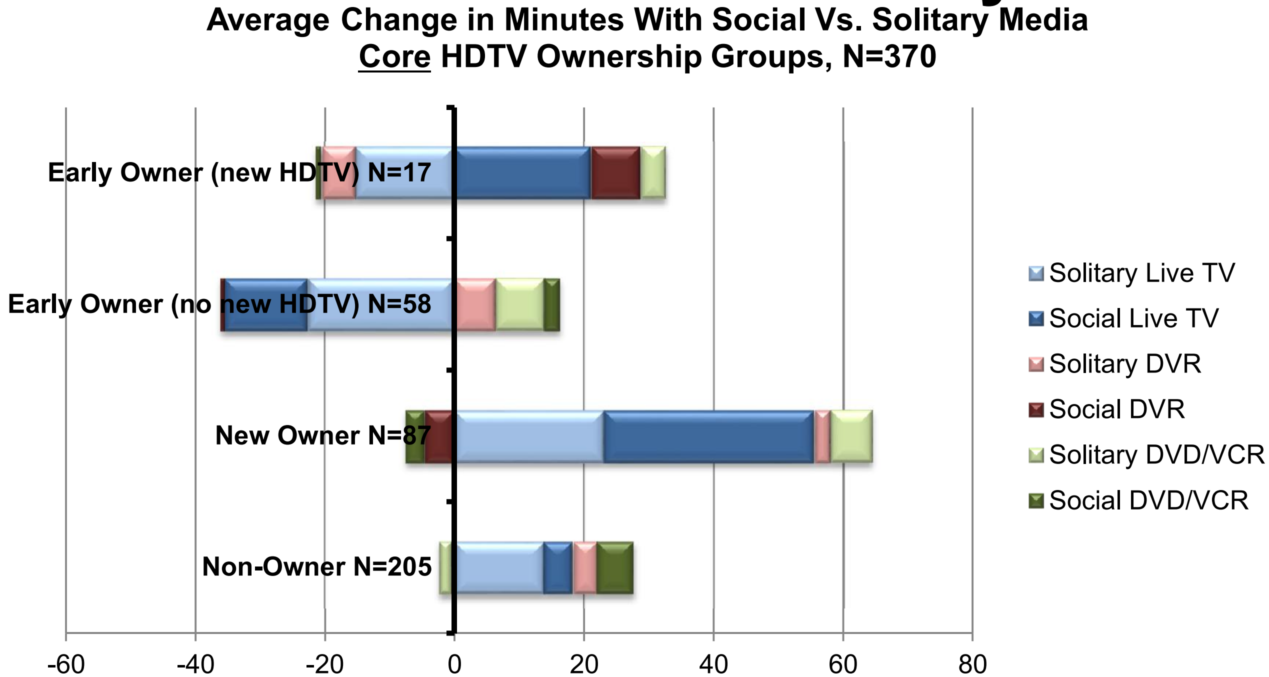
- Increasing by 20% for new HDTV owners
- Decreasing by 12-14% for early HDTV owners who haven't added a 2nd HDTV set

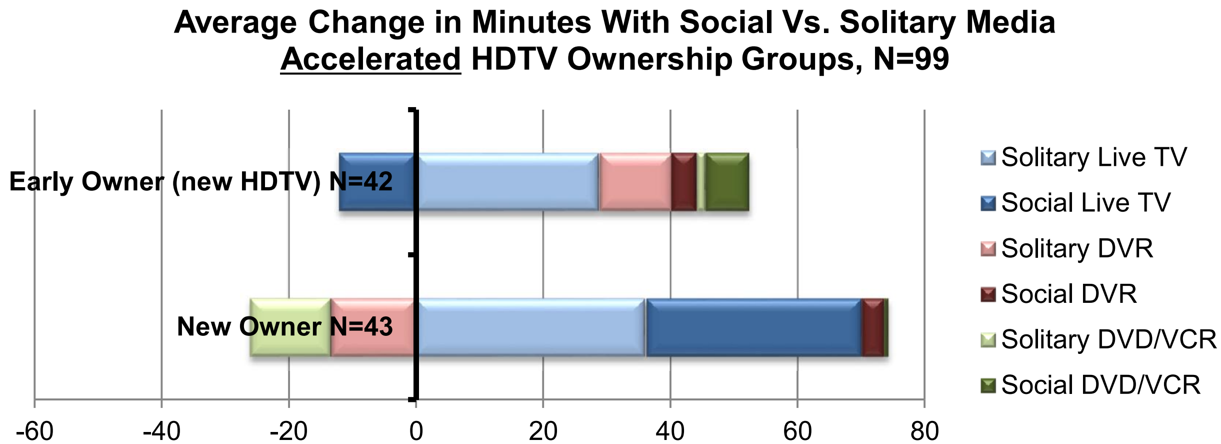
Percent change from Spring to Fall 2008 in TV viewing, with and without sports

		Early owners no addtl HDTV	New HDTV owners	Non-HDTV owners
	(N=)	(58)	(87)	(205)
With Sports	**Total TV/Video**	-4%	+18%	+6%
With Sports	**Total TV**	-9%	+19%	+7%
With Sports	**Live TV**	-11%	+20%	+6%
Without Sports	**Total TV/Video Sports**	-6%	+18%	+4%
Without Sports	**Total TV Sports**	-11%	+18%	+5%
Without Sports	**Live TV Sports**	-14%	+20%	+4%

Contents

HDTV Ownership Groups Varied In Social Vs. Solitary TV Viewing





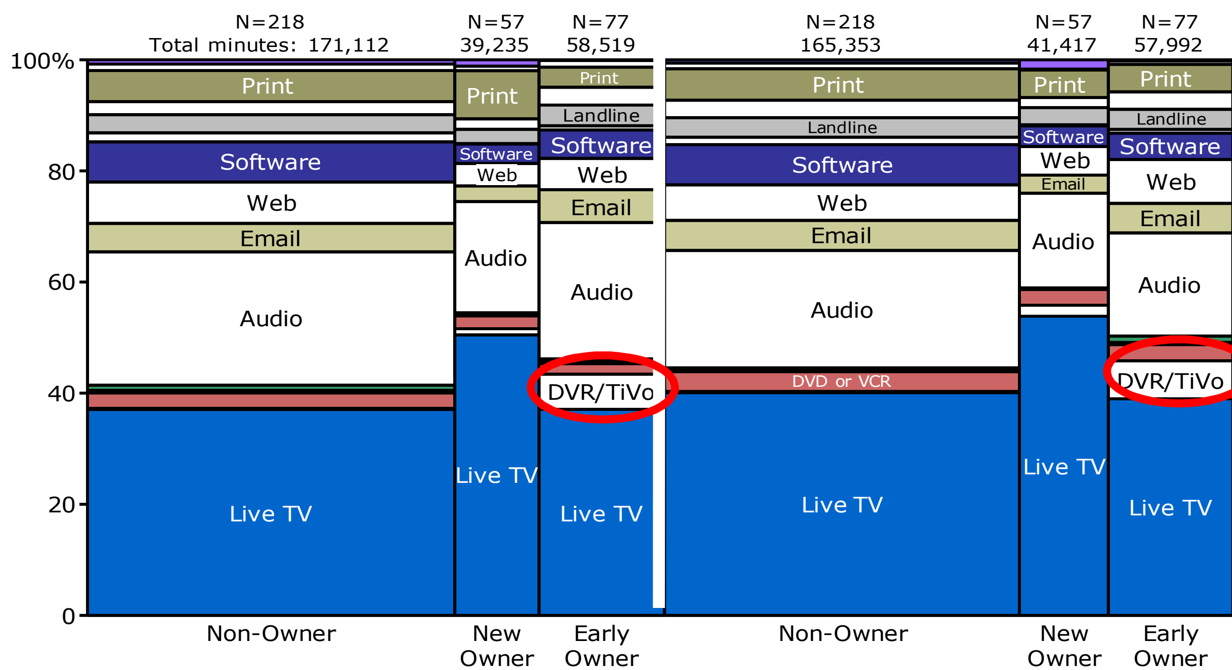
Contents

10.

Early DVR Owners Showed The Most Playback

Spring Vs. Fall Ownership	Name of group	Core Sample	Accelerated Sample
1 - 1	Early Owners	Yes N=77	Yes N=50
0 - 1	New Owners	Yes N=57	No N=17
0 – 0	Non Owners	Yes N=218	Yes N=25

Core sample (N=376) Spring '08 Fall '08

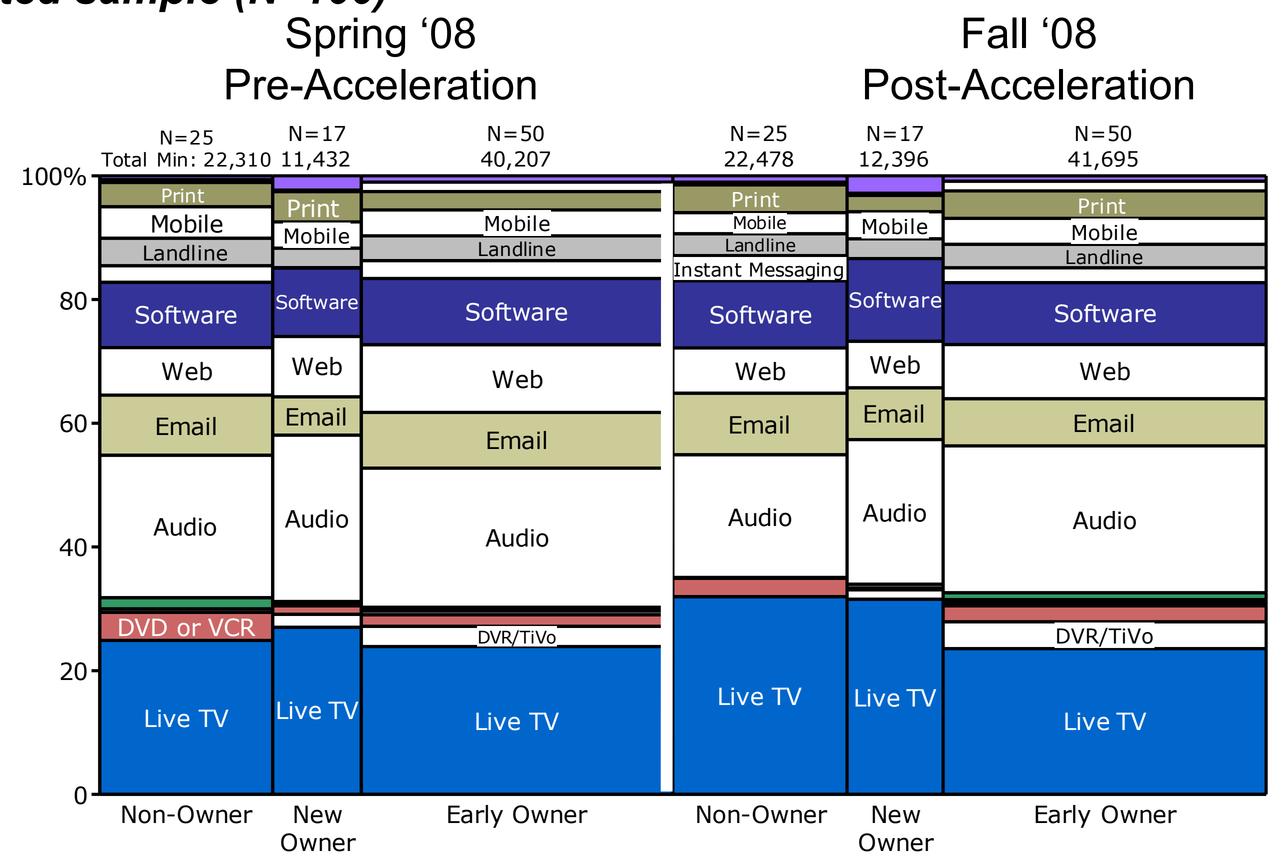


Accelerated sample data was similar, but with smaller sample sizes

Contents

Accelerated DVR Player Ownership: Early Owners Show The Most Playback

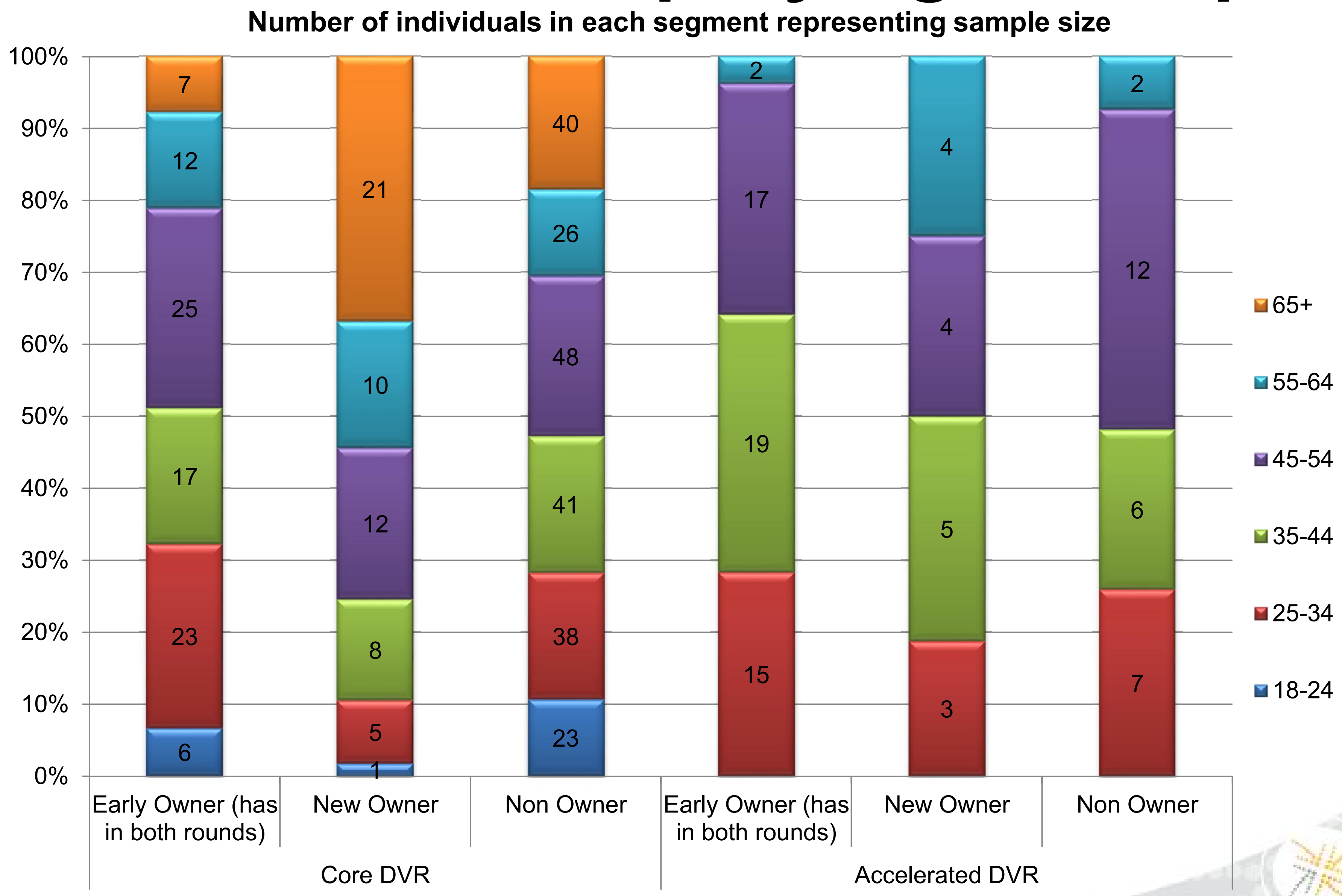
Accelerated sample (N=100)



Half of Accelerated sample owned DVRs before acceleration, and relatively few were attracted to new DVR ownership

Contents

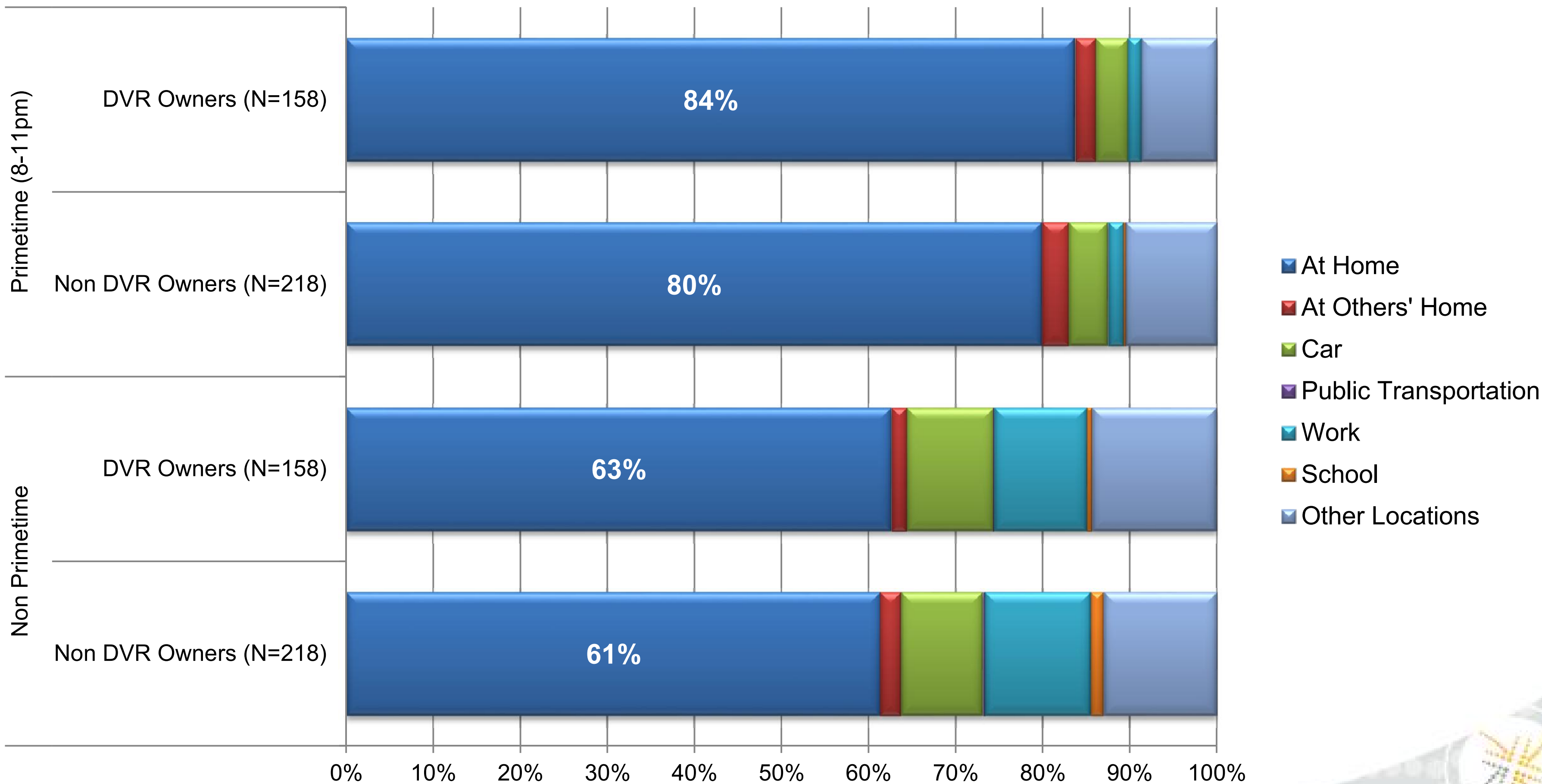
DVR Ownership By Age Group



Contents

11. DVR Owners Are Similar To Non-Owners In Share Of Time Spent At Home (In Primetime And Otherwise)

Share of Time Spent In Various Locations By Time of Day
Non DVR Owners (N=436 observed days) Vs. DVR Owners (N=316)

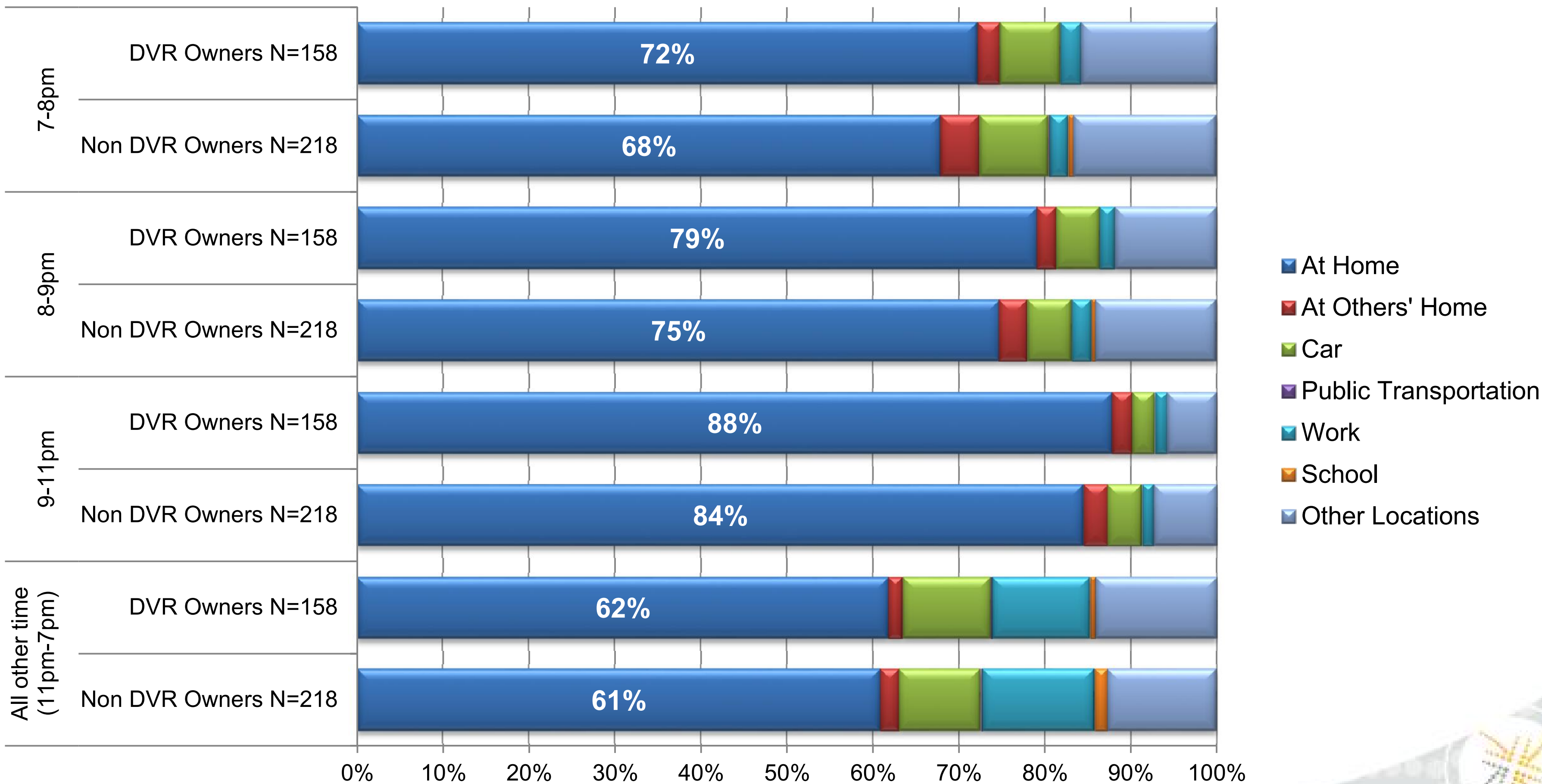


Note: DVR ownership based on Rd2 data

Contents

DVR Owners Are Similar To Non-Owners In Share Of Time Spent At Home (In Evening Hours And Otherwise)

Share of Time Spent In Various Locations By Time of Day
Non DVR Owners (N=436 observed days) Vs. DVR Owners (N=316)

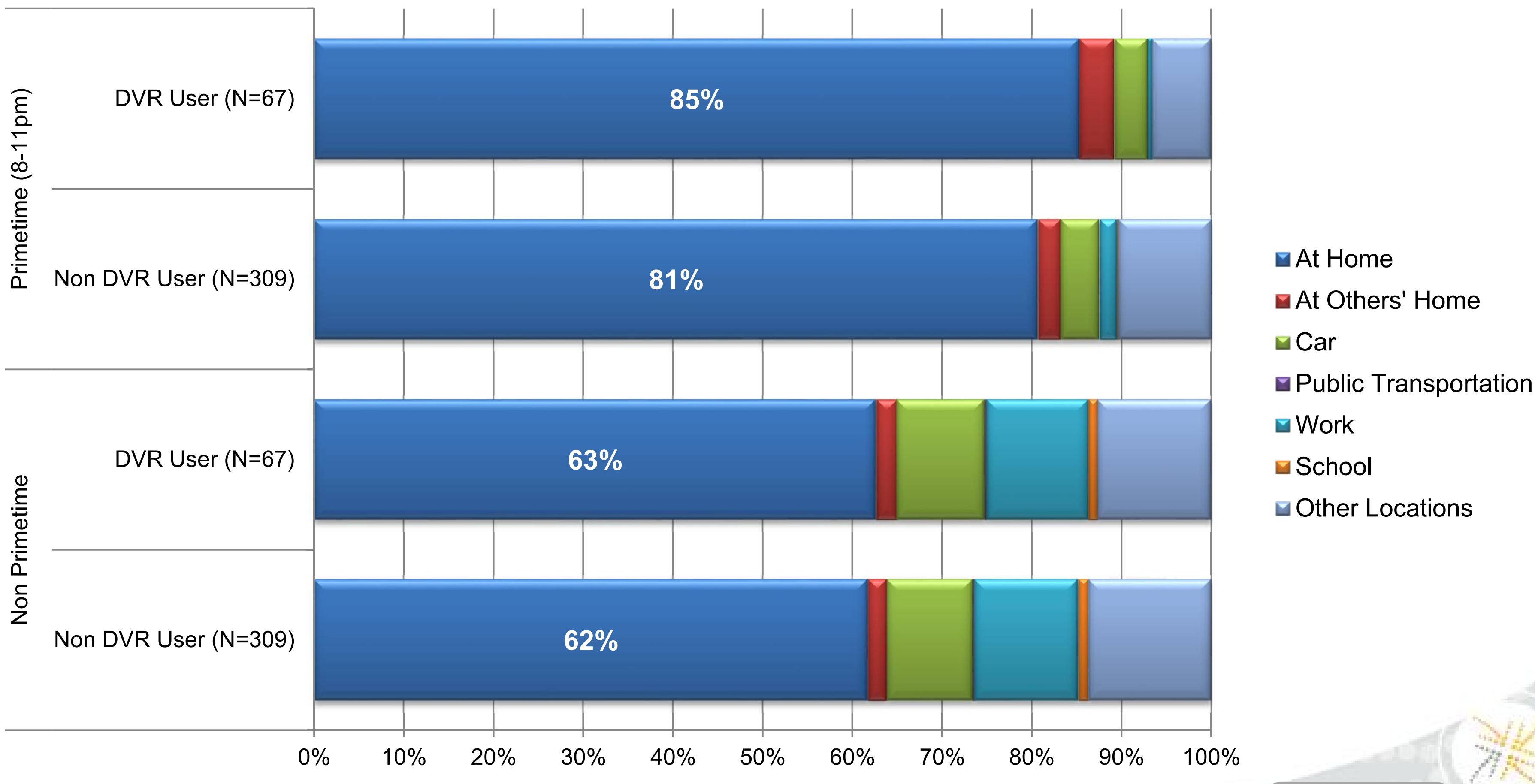


Note: DVR ownership based on Rd2 data

Contents

DVR Users Are Similar To Non-Users In Share Of Time Spent At Home (In Primetime And Otherwise)

Share of Time Spent In Various Locations By Time of Day
<u>Non DVR Users</u> (N=618 observed days) Vs. <u>DVR Users</u> (N=134)



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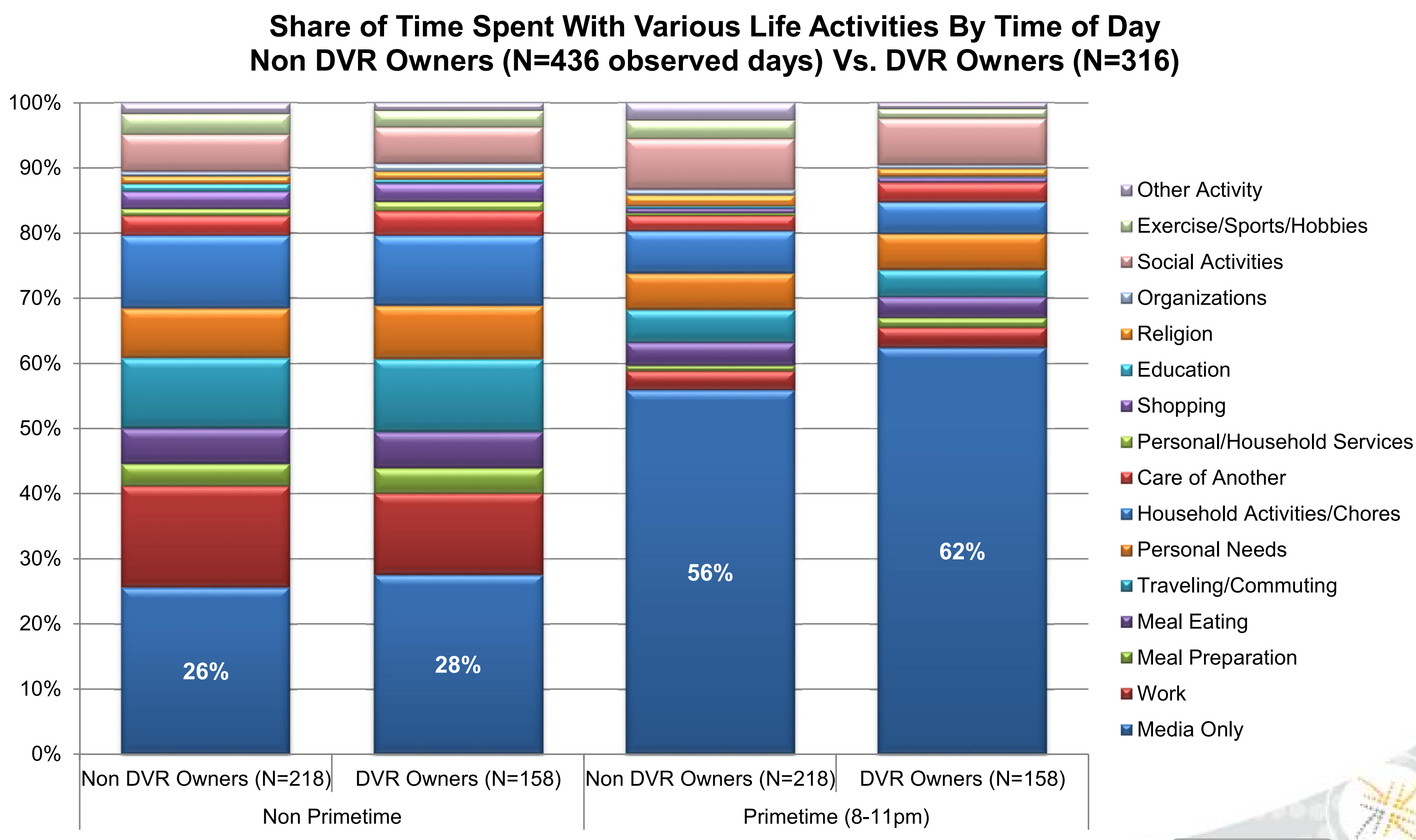
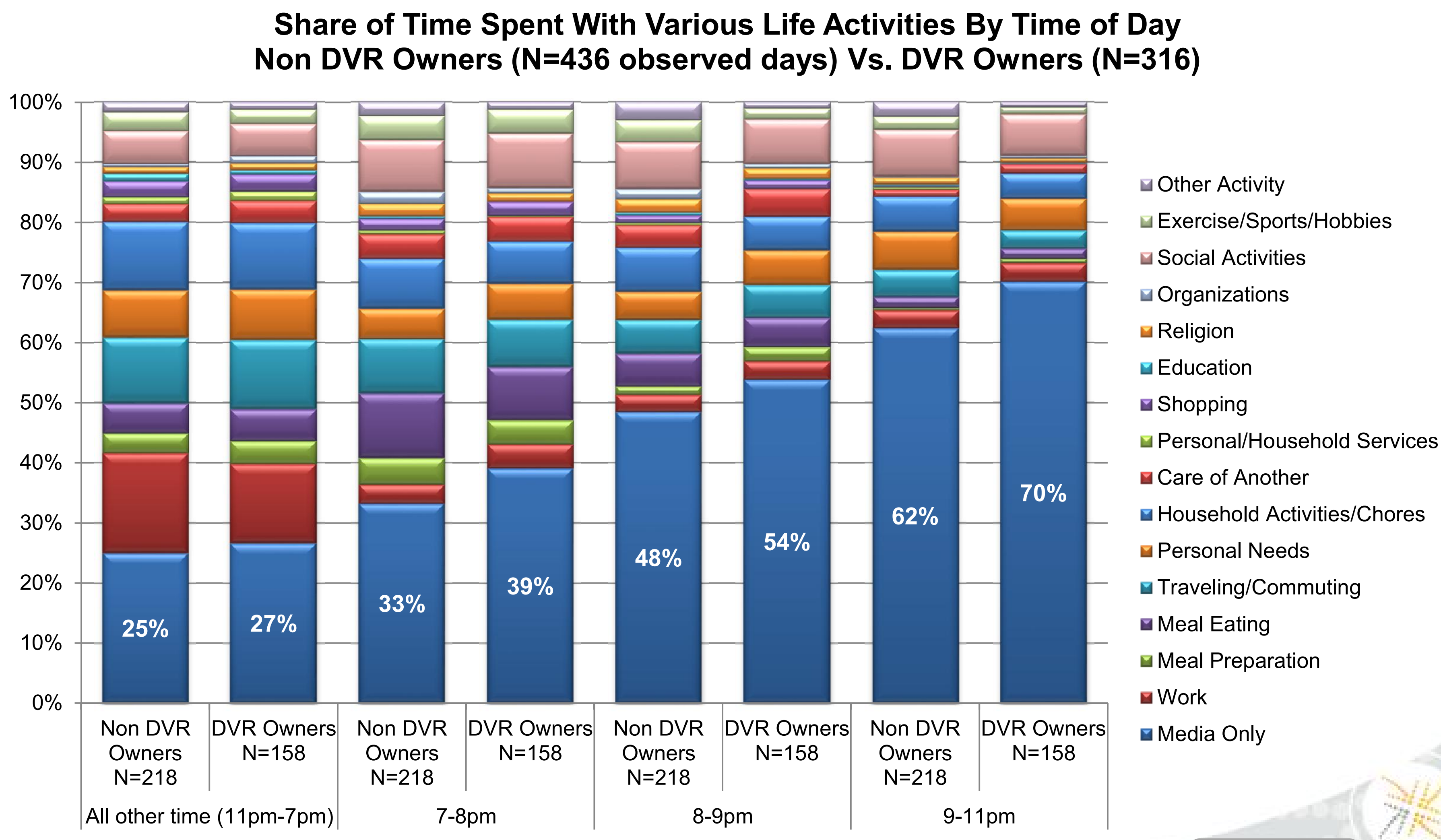
DVR Owners Spent A Slightly Higher Share Of Their Primetime Hours With Media Only



Note: DVR ownership based on Rd2 data

Contents

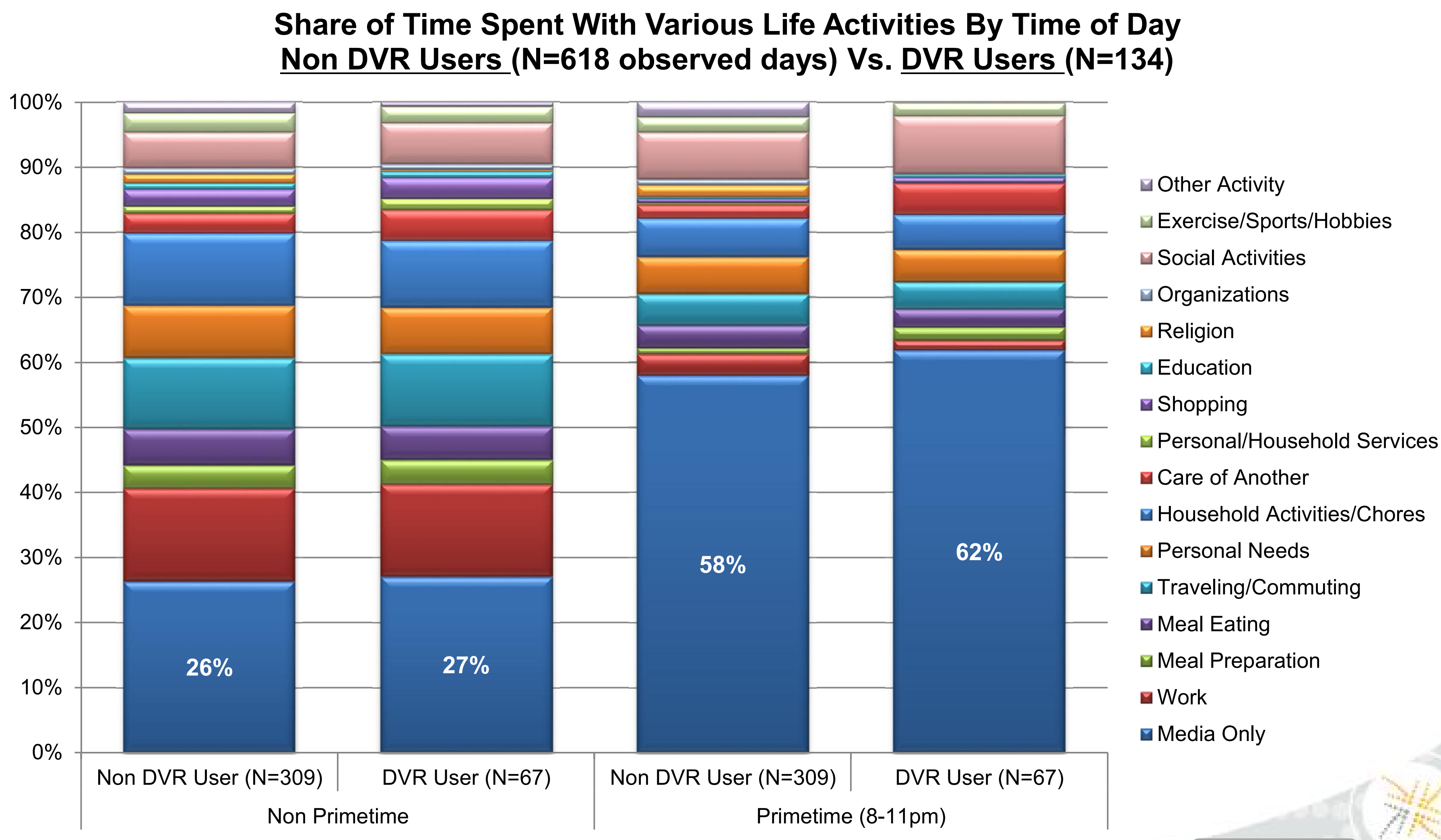
DVR Owners Consistently Spent A Higher Share Of Their Time Than Non-Owners With Media Only Across DayParts



Note: DVR ownership based on Rd2 data

Contents

DVR Users Spent A Slightly Higher Share Of Their Primetime Hours With Media Only

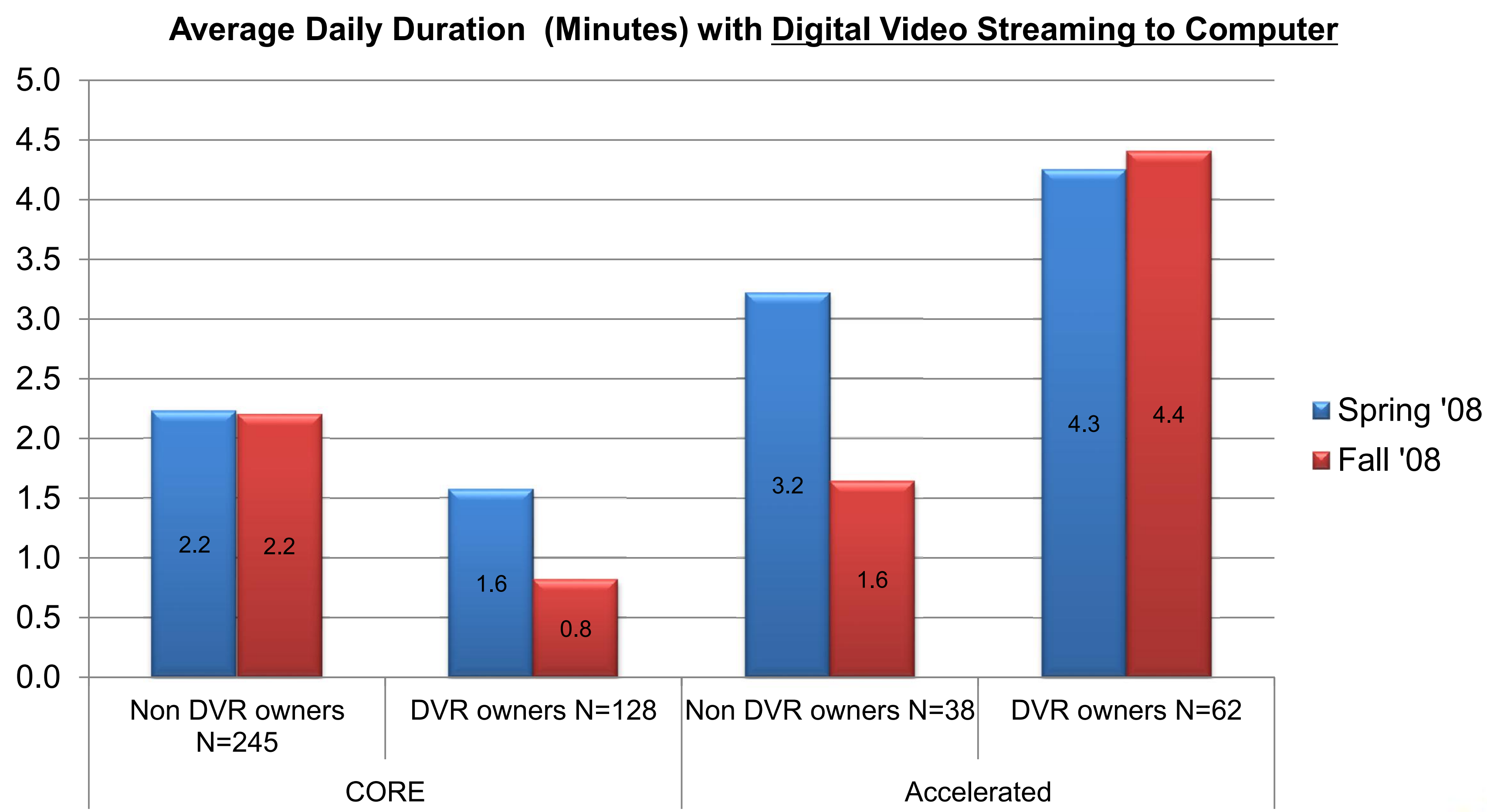


Contents

12. Internet Video Too Small To Show Stable Results In Group Comparisons

- Total digital video streaming to computer is so small that dividing it up into groups based on DVR ownership and making comparisons has not led to any stable and consistent conclusions
- 1.85 average daily minutes per all participants (Core sample, N=752 observed days Spring and Fall ‘08)
- It is even limited among users (14%) averaging 12.9 daily minutes per user

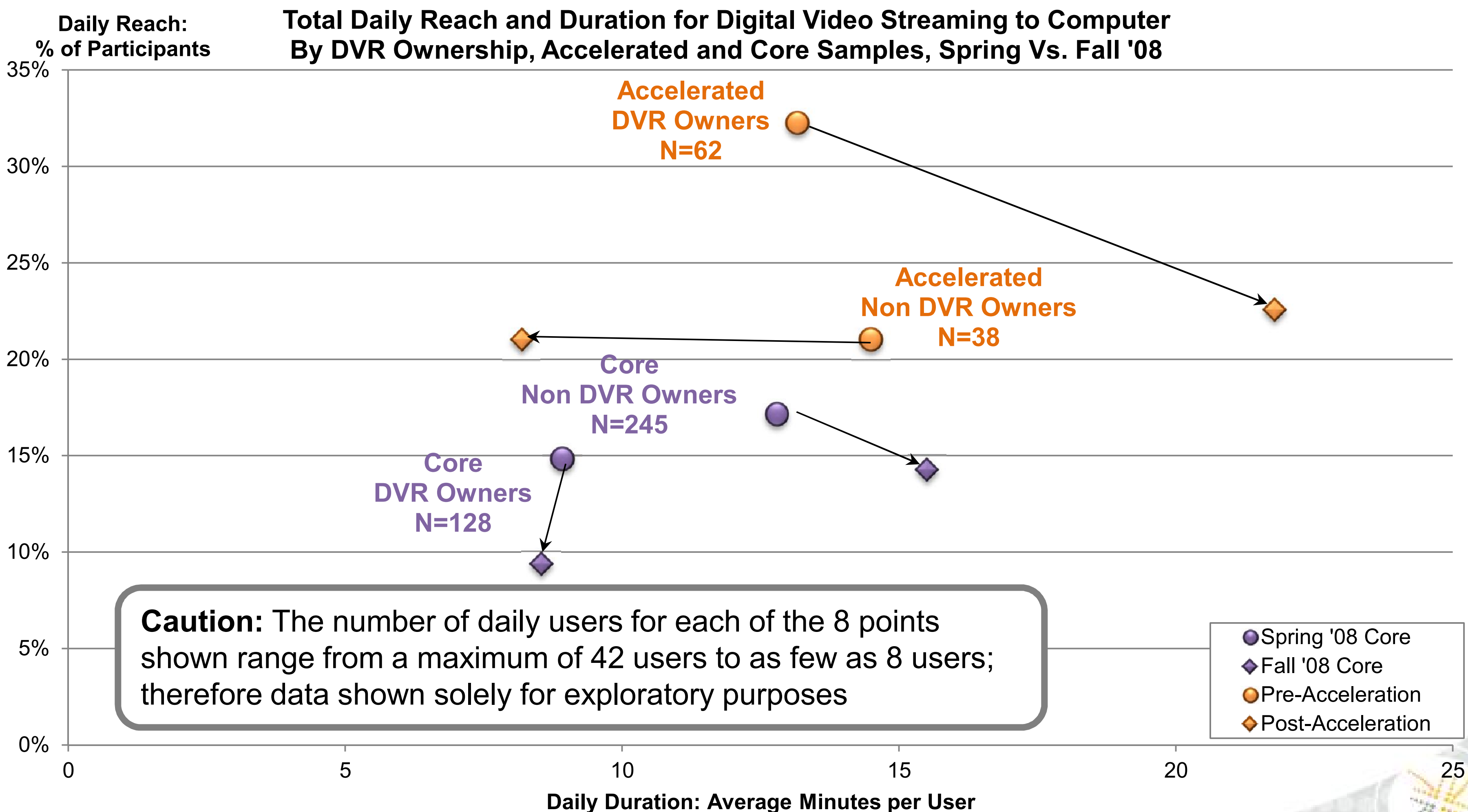
Internet Video Too Small To Show Stable Results In Group Comparisons



Note: Ownership categorization based on Fall '08 ownership of any DVR device (incl. cable subscription)

Contents

Internet Video Too Small To Show Stable Results In Group Comparisons

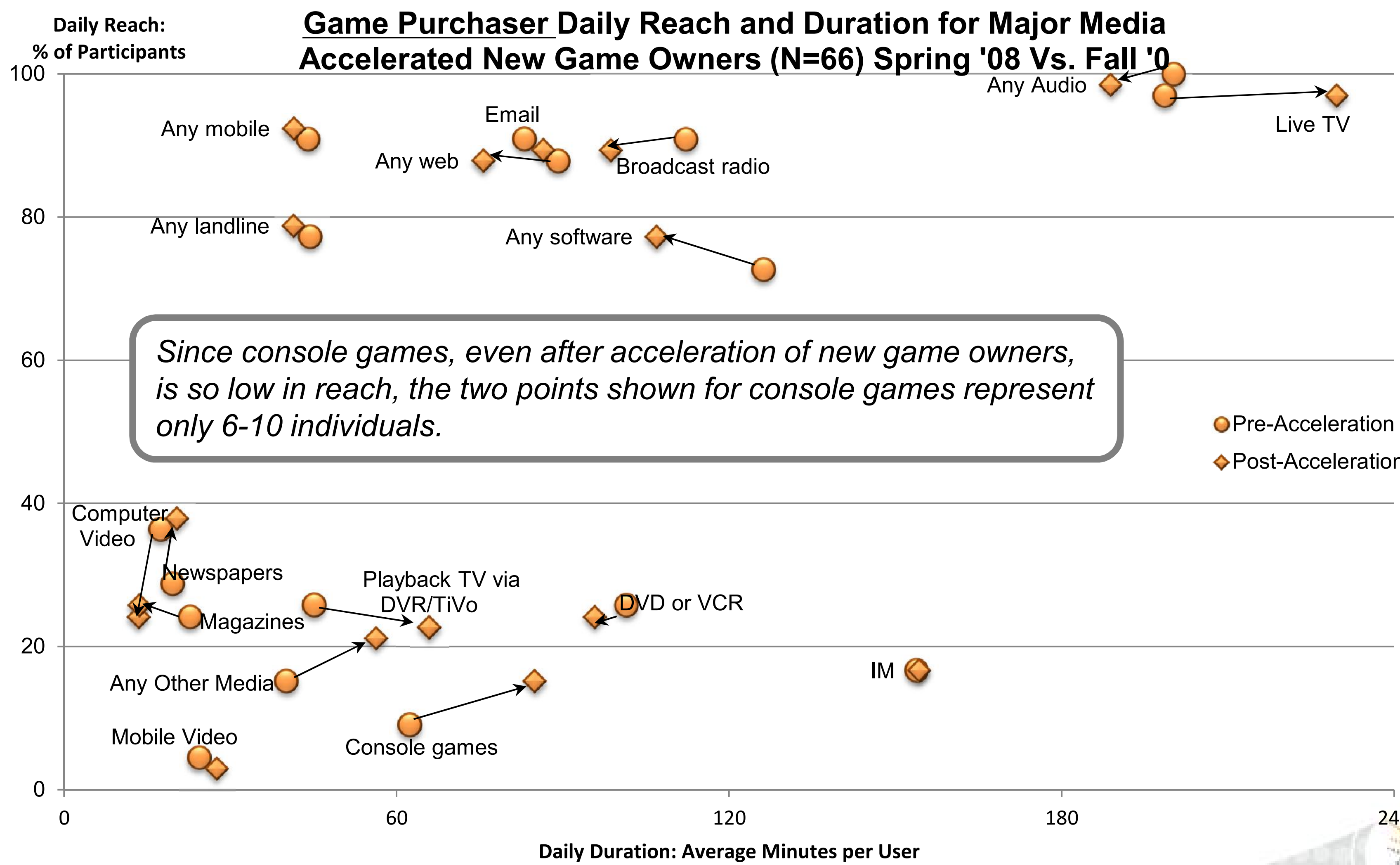


Caution: The number of daily users for each of the 8 points shown range from a maximum of 42 users to as few as 8 users; therefore data shown solely for exploratory purposes

Contents

13. Game Ownership And Video Media

Accelerated Game Purchasers Increased Their Time With Live TV And Console Games, But Decreased It With Computer Applications, Especially Computer Video



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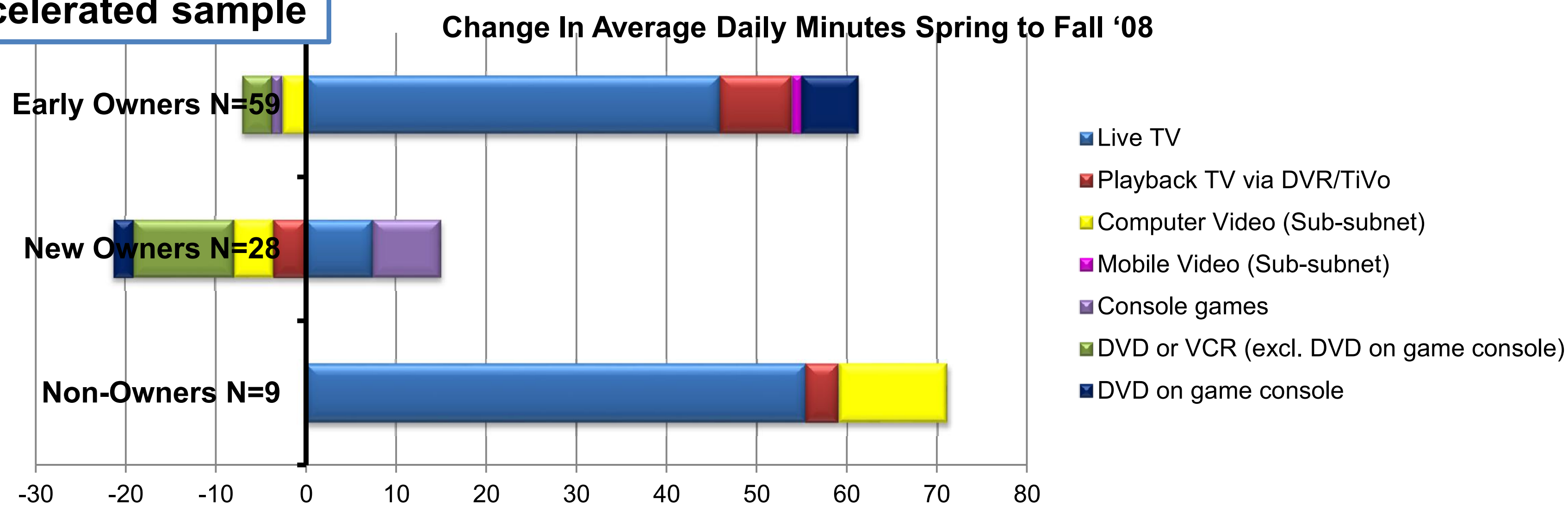
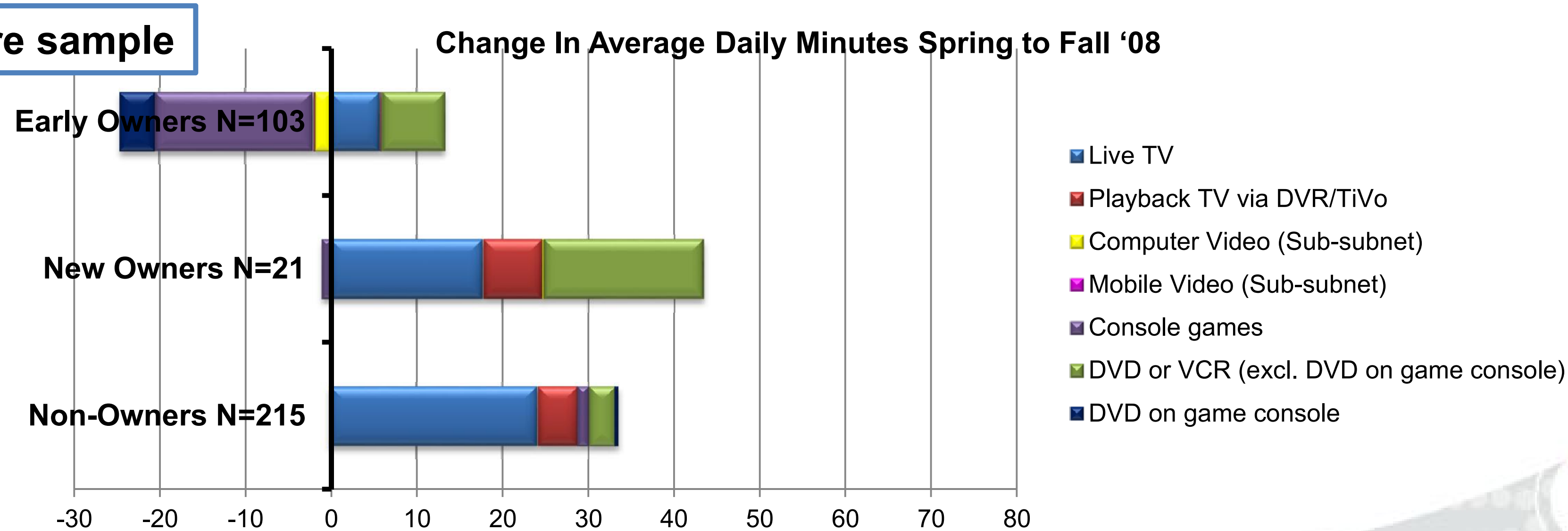
Among The Accelerated, First Time Game Owners Decreased All Media Usage Except For TV and Games

Accelerated sample



Core sample

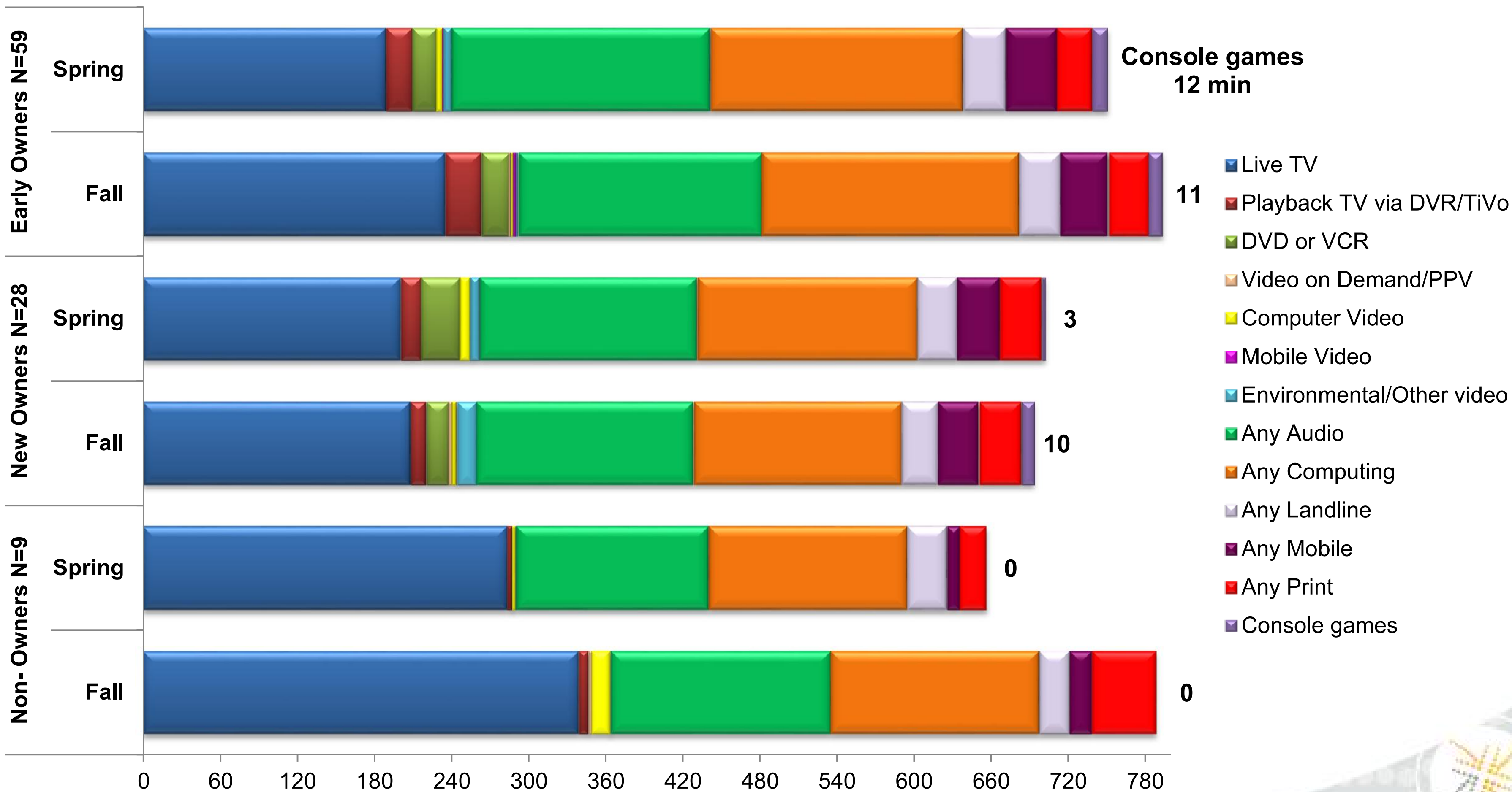


Contents

While Early Owners Kept Their Gaming Time The Same, New Owners Approached Early Owner Time

Caution: Small sample sizes for 2 of 3 groups

Average Daily Duration With Media By Game Console Ownership Groups
Accelerated Sample (N=100) Spring Vs. Fall '08



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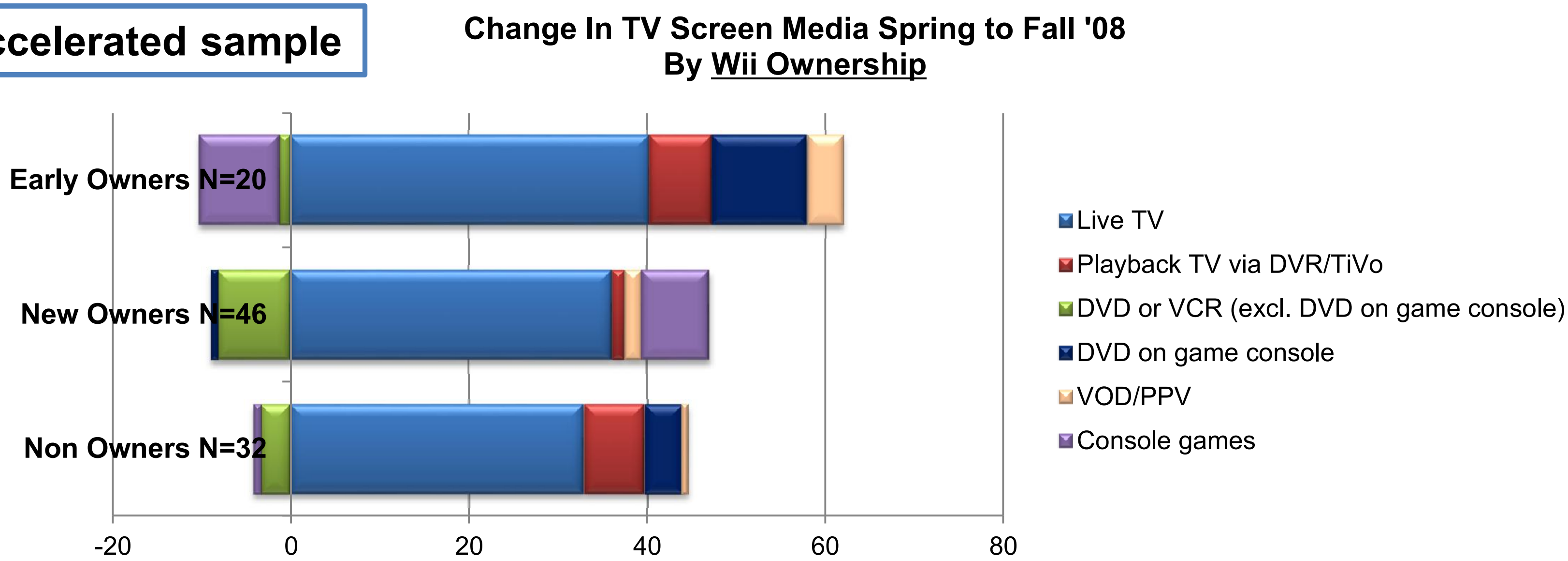
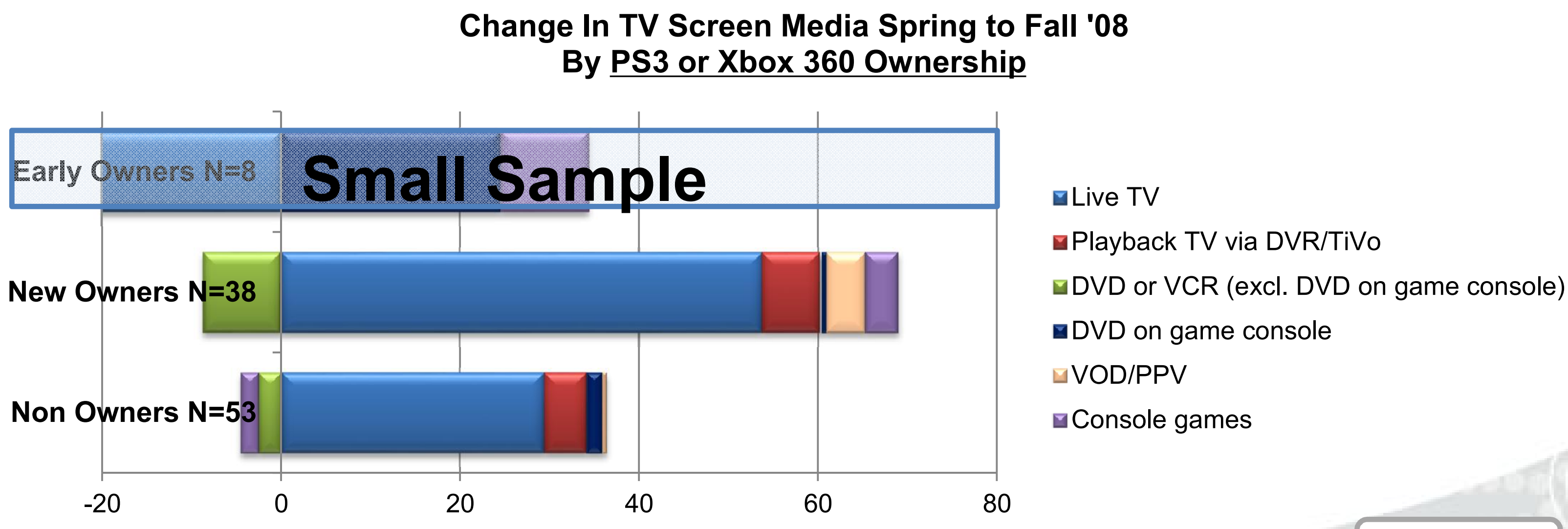
The Spring-To-Fall Increase In TV Time May Have Overwhelmed Changes In Game Console Time

Accelerated sample





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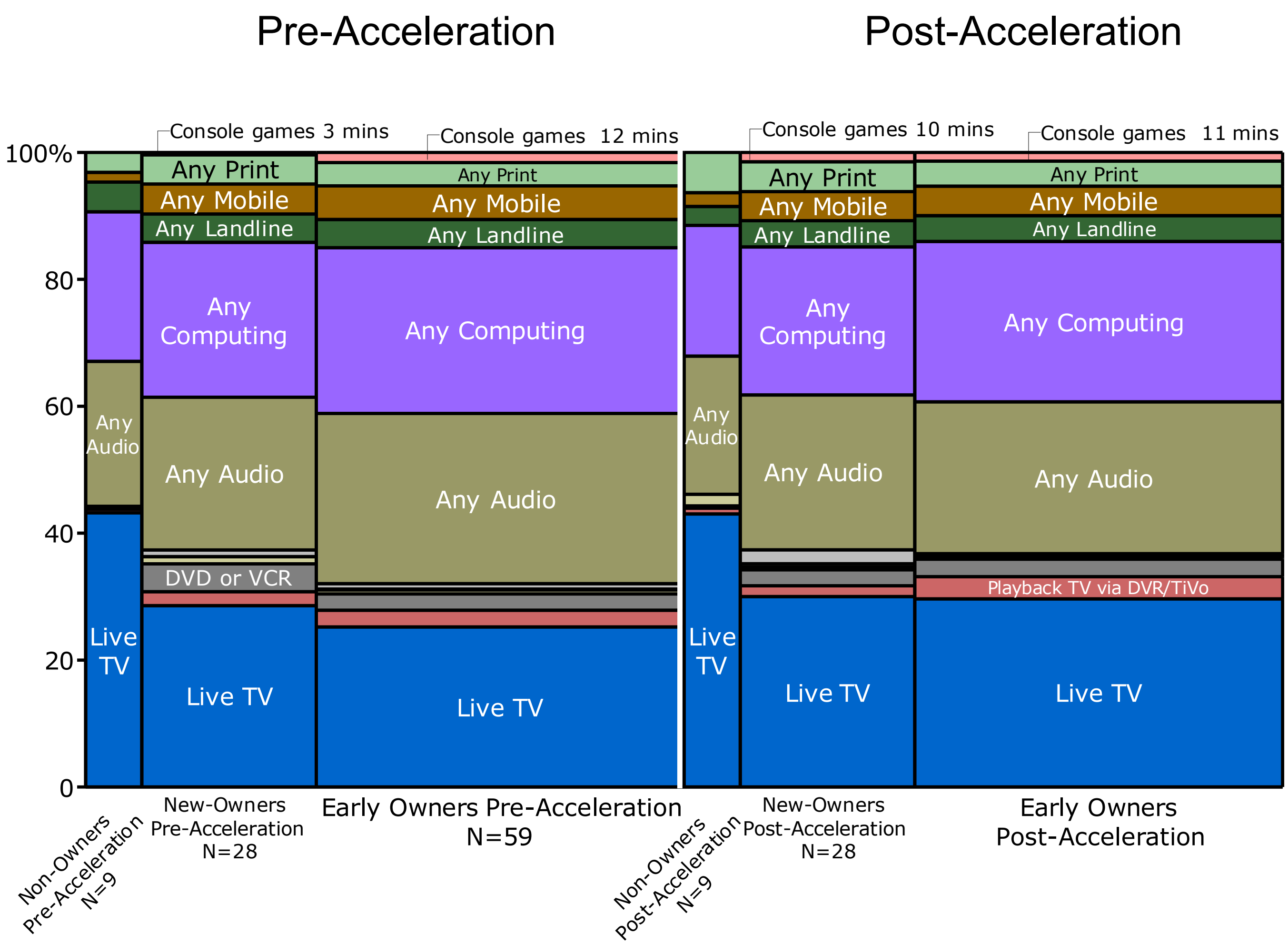
Game Ownership Effects Are Difficult To Detect



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14. Device Ownership And TV Genre

Contents

Sports, Navigation & DVR Use Are Interesting Among HDTV Owners. HDTV Owners Spend A Bit More Time With DVR Playback. HDTV Owners 15% More Minutes Of News Than Non-owners.

VCM Device Ownership

Core Sample

Daily Incidence	HDTV Ownership				
	Owner	Non-Owner	New Owner	owners/non-owners Index	New Owners/Owners Index
Base: Total Respondents	226	502	170		
Any Live TV (Net)	95.9969	92.39781	94.7	103.9	98.6
Live TV Ad/Program promotion	90.73097	81.85359	85.3	110.8	94.0
Any Live TV Non-Advertising (Subnet)	95.9969	92.19562	94.7	104.1	98.6
News program	73.90531	73.1257	75.3	101.1	101.9
Sports program (ESPN, NFL, NOT sports segment of evening news)	47.83628	38.06454	43.55	125.7	91.0
Entertainment/info program (sitcom, documentary, informercial)	90.25088	86.24861	88.85	104.6	98.4
Surfing	33.21681	40.07709	34.7	82.9	104.5
Navigation (e.g., program guide)	51.73097	36.63327	52.35	141.2	101.2
Unknown Live TV	5.342035	11.15398	9.4	47.9	176.0
TiVo/DVR	22.5615	12.35956	20.6	182.5	91.3

Total Daily Minutes: Means Including Zero	HDTV Ownership				
	Owner	Non-Owner	New Owner	owners/non-owners Index	New Owners/Owners Index
Base: Total Respondents	226	502	170		
Any Live TV (Net)	320.9274	304.5949	305.555	105.4	95.2
Live TV Ad/Program promotion	64.52571	59.51797	60.48	108.4	93.7
Any Live TV Non-Advertising (Subnet)	253.0774	237.0287	238.755	106.8	94.3
News program	64.9477	56.44596	62.525	115.1	96.3
Sports program (ESPN, NFL, NOT sports segment of evening news)	39.01619	35.0297	44.285	111.4	113.5
Entertainment/info program (sitcom, documentary, informercial)	144.2382	141.6071	127.325	101.9	88.3
Surfing	1.135619	1.529124	0.91	74.3	80.1
Navigation (e.g., program guide)	3.736239	2.402729	3.705	155.5	99.2
Unknown Live TV	3.330885	8.042331	6.33	41.4	190.0
TiVo/DVR	17.40889	11.72351	15.745	148.5	90.4

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Percentiles Of Time Spent With TV Genre

Average Duration: Total Daily Minutes Percentiles

Core Sample

Base: Total Respondents 752

	Any Live TV (Net)	Live TV Ad/Program promotion	Any Live TV Non-Advertising (Subnet)	News program	Sports program (ESPN, NFL Total Access, NOT sports segment of evening news)	Entertainment/info program (sitcom, documentary, informercial)	Surfing	Navigation (e.g., program guide)	Unknown Live TV	TiVo/DVR
Maximum	1075.81	474.21	907.65	670.78	645.48	761.15	62.53	45.51	270.05	595.2
90th percentile	706.89	160.43	545.12	188.12	247.22	391.26	8.71	19	150.36	164.28
80th percentile	533.69	117.74	417.47	135.03	145.03	273.7	4.42	12.34	118.69	128.09
75th percentile	480.08	105.57	368.76	119.52	119.52	226.6	3.5	9.84	102.34	120.02
70th percentile	435.57	92.33	336.38	100.49	98.85	204.71	3	8.17	94.7	106.39
60th percentile	349.74	73.2	273.69	78.35	65.35	156.1	2	5.33	65.68	82.35
50th percentile	282.46	57.24	221.91	57.32	43.17	121.97	1.33	3.67	59.18	64.51
40th percentile	217.26	41.17	173.15	37.67	27.67	87.5	1	2.17	30.01	52.34
30th percentile	160.83	30.51	129.68	24.65	15	60.68	0.67	1.5	27.34	41.51
25th percentile	136.53	24.81	113.86	18.17	8.5	48.19	0.5	1.17	25	36.17
20th percentile	110.69	19.65	89.35	13.17	4.5	35.21	0.33	0.83	18.5	21.17
10th percentile	50.18	10	37.34	2.83	0.67	13.85	0.17	0.33	12.17	7.68
Minimum	0.15	0.17	0.15	0.15	0.15	0.17	0.12	0.15	0.5	0.33

Accelerated Sample

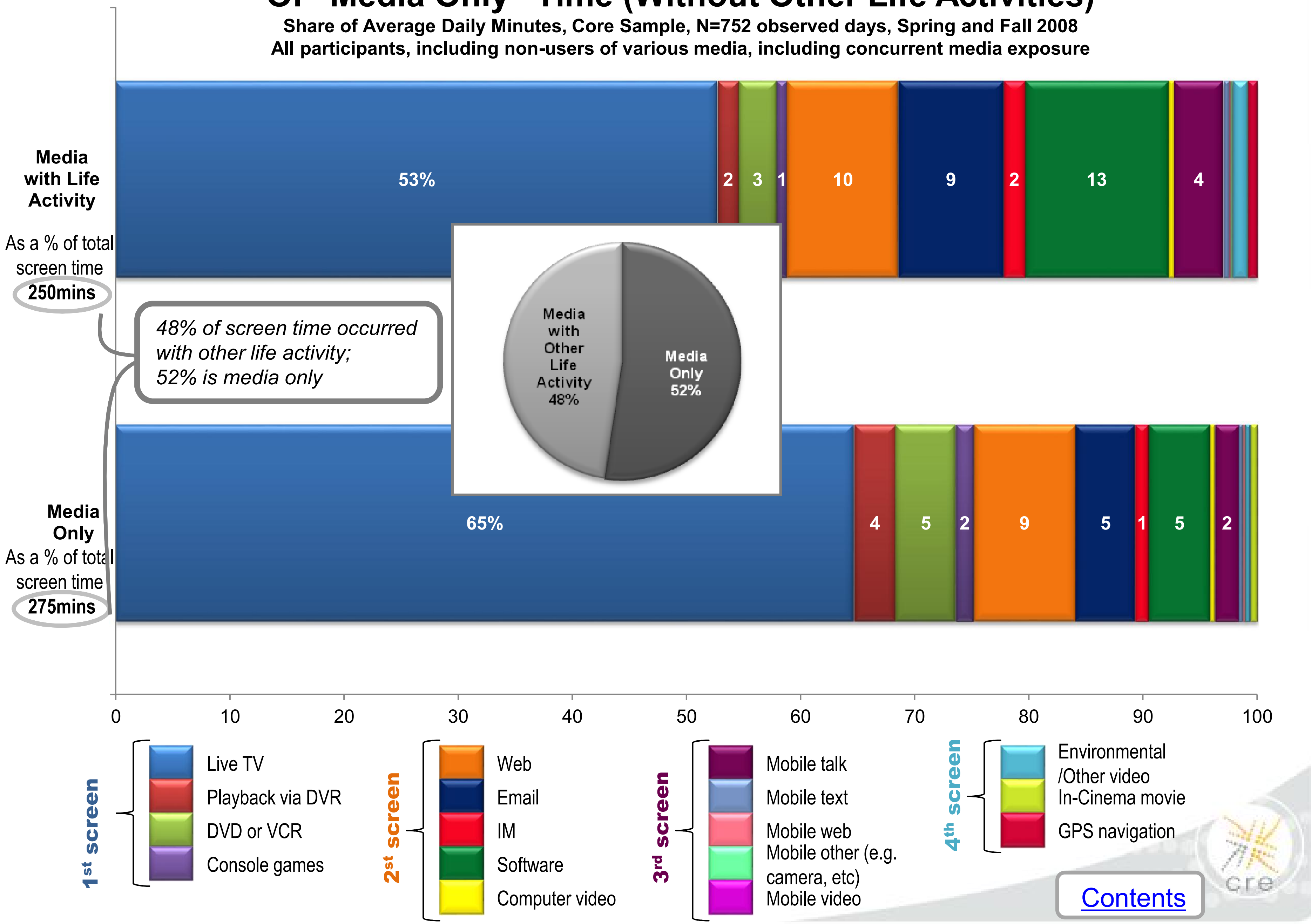
Base: Total Respondents 200

	Any Live TV (Net)	Live TV Ad/Program promotion	Any Live TV Non-Advertising (Subnet)	News program	Sports program (ESPN, NFL Total Access, NOT sports segment of evening news)	Entertainment/info program (sitcom, documentary, informercial)	Surfing	Navigation (e.g., program guide)	Unknown Live TV	TiVo/DVR
Maximum	1167.8	200.21	1147.62	470.91	532.22	1127.29	33.69	28.34	78.68	238.88
90th percentile	442.09	85.17	350.32	145.98	228.54	196.7	9.15	10	73.01	175.02
80th percentile	346.04	66.35	285.14	99.35	146.68	150.18	3.5	5.85	65.68	92
75th percentile	319.89	56.84	244.5	80.02	129.01	135.84	2.83	5	63.68	78.6
70th percentile	275.87	52.19	219.71	64.63	108.4	120.02	2.17	4.37	60.01	68.66
60th percentile	230.02	37.51	188.49	56.18	72.33	91.63	1.5	3.02	46.18	61.35
50th percentile	184.19	29.01	153	42.34	48.71	75.01	1	2.33	31.17	51.89
40th percentile	144.7	23.19	124.94	31.32	29.11	52.83	0.83	2	30.17	43.14
30th percentile	101.52	14.54	91.18	22.67	20.5	30.04	0.67	1.5	30.01	31.84
25th percentile	93.34	11.37	78.35	19.59	15.34	23.49	0.5	1.33	14.5	26.76
20th percentile	79.32	9.17	61.91	16.84	5.33	18.84	0.33	1	12.92	23.17
10th percentile	41.51	3.83	39.22	5.33	1	6.17	0.17	0.33	5	2.67
Minimum	0.17	0.17	0.17	0.13	0.17	0.17	0.15	0.15	1	0.5

15. Life Activities And Media Data

TV (Live + DVR Playback) Commanded A Relatively High Share Of "Media Only" Time (Without Other Life Activities)

Share of Average Daily Minutes, Core Sample, N=752 observed days, Spring and Fall 2008
All participants, including non-users of various media, including concurrent media exposure



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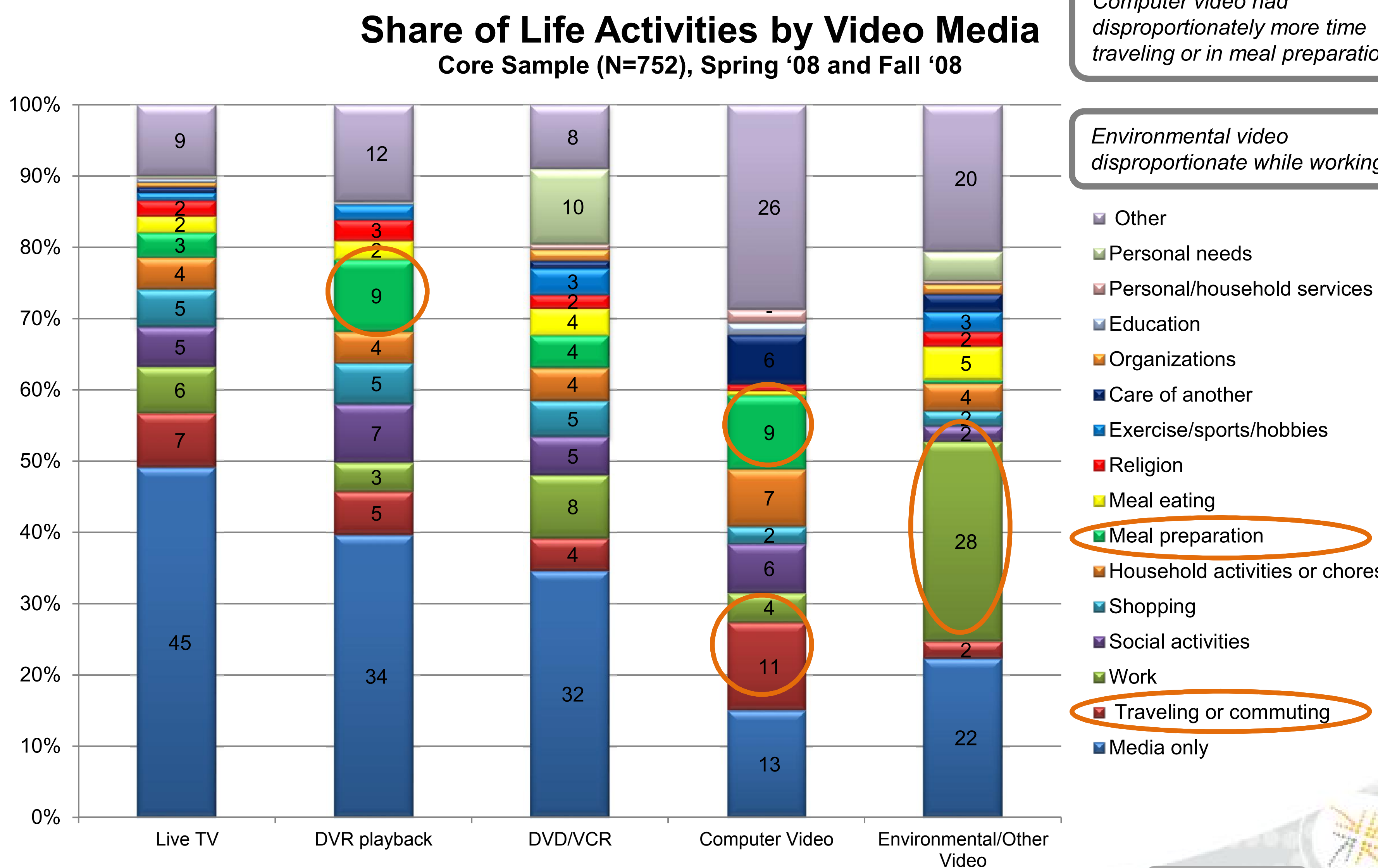
Life Activities Were Relatively Similar For Live TV-DVR-DVD Except Disproportionally More Time In Meal Preparation With DVRs



Computer video had disproportionately more time traveling or in meal preparation

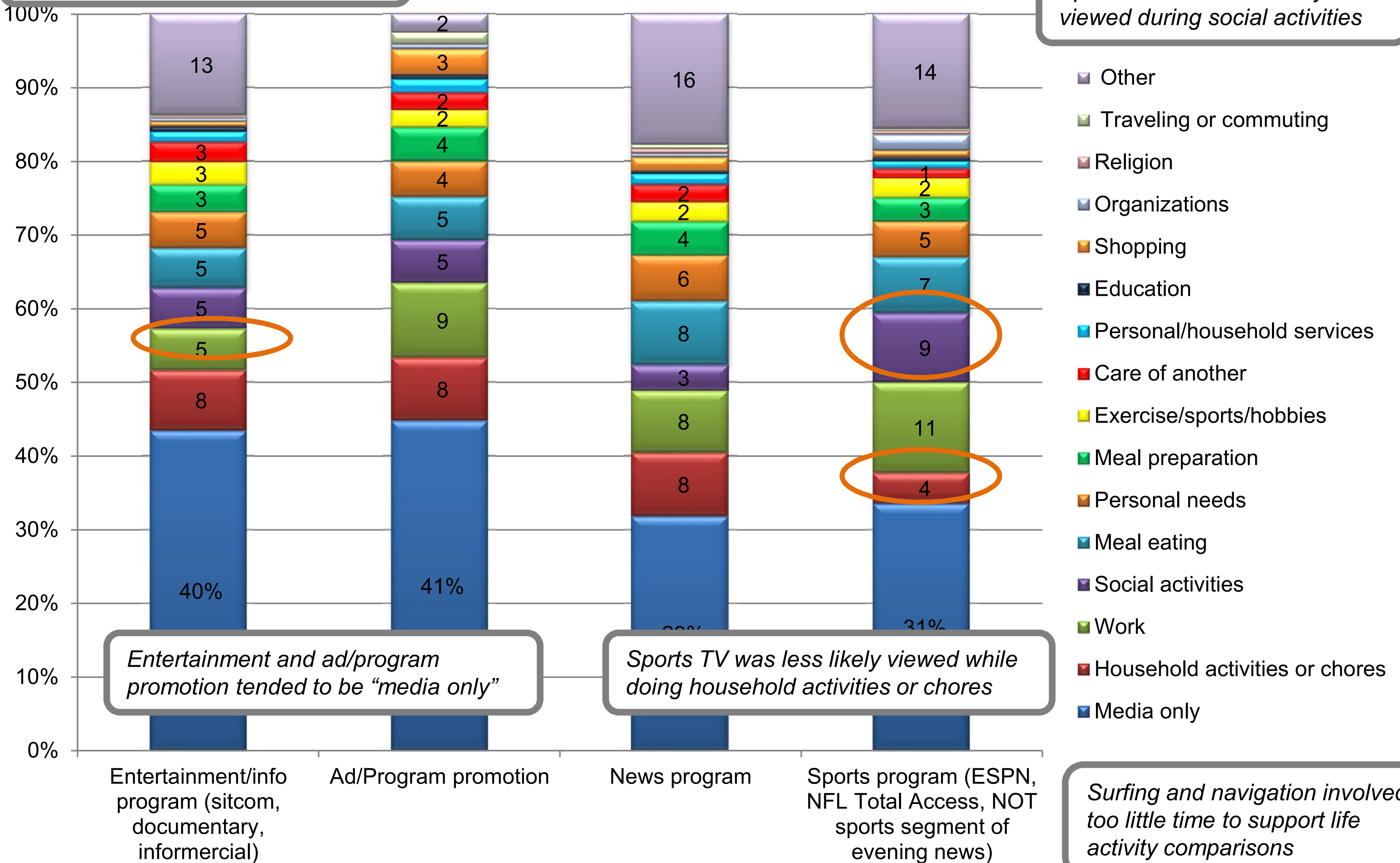
Environmental video disproportionate while working

Contents

Life Activities Were Relatively Similar Across Major TV Genres

Except that entertainment TV was less likely viewed while working

Sports TV was more likely viewed during social activities



Entertainment and ad/program promotion tended to be "media only"

Sports TV was less likely viewed while doing household activities or chores

Surfing and navigation involved too little time to support life activity comparisons

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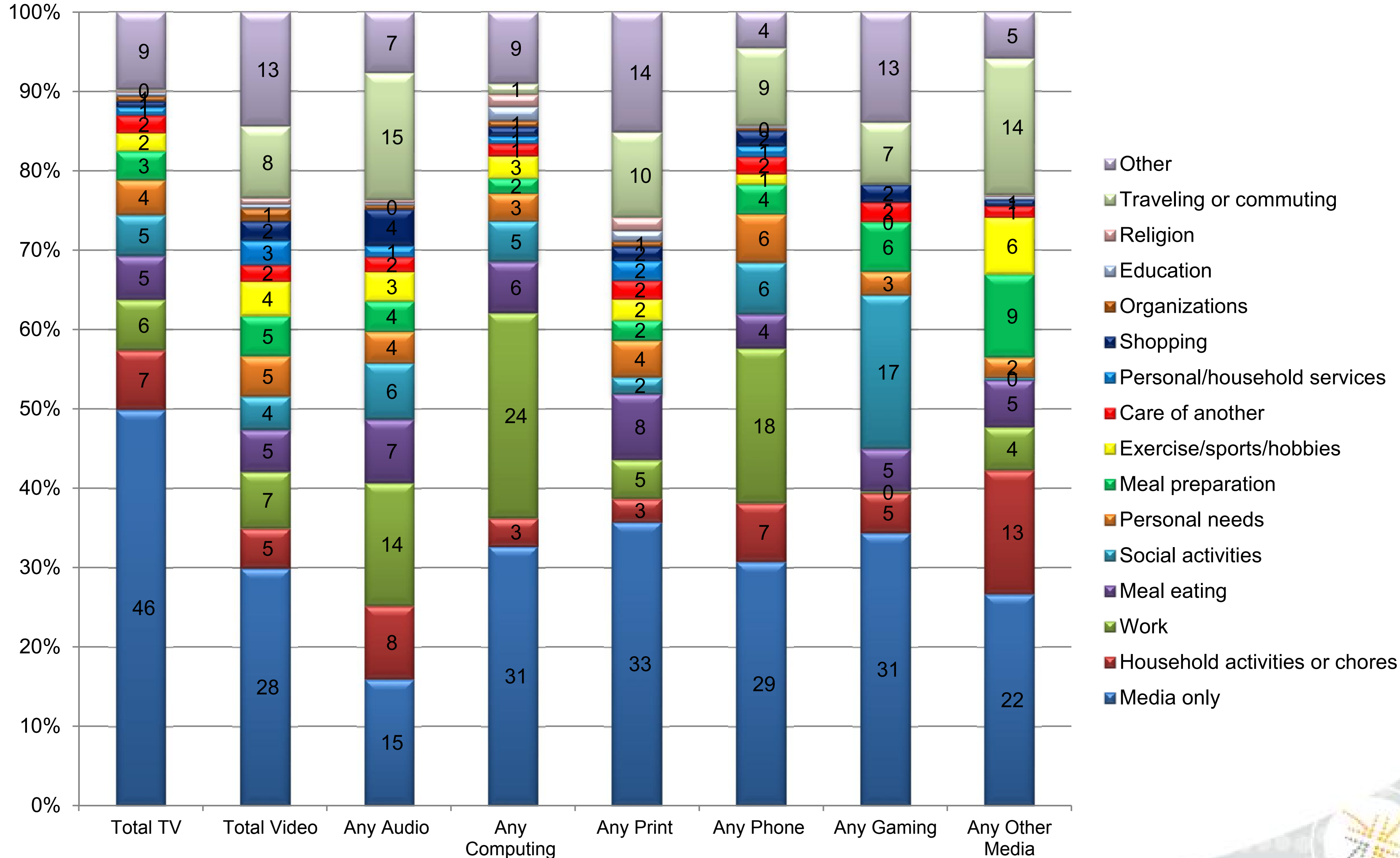
Life Activity Share Across Major Media



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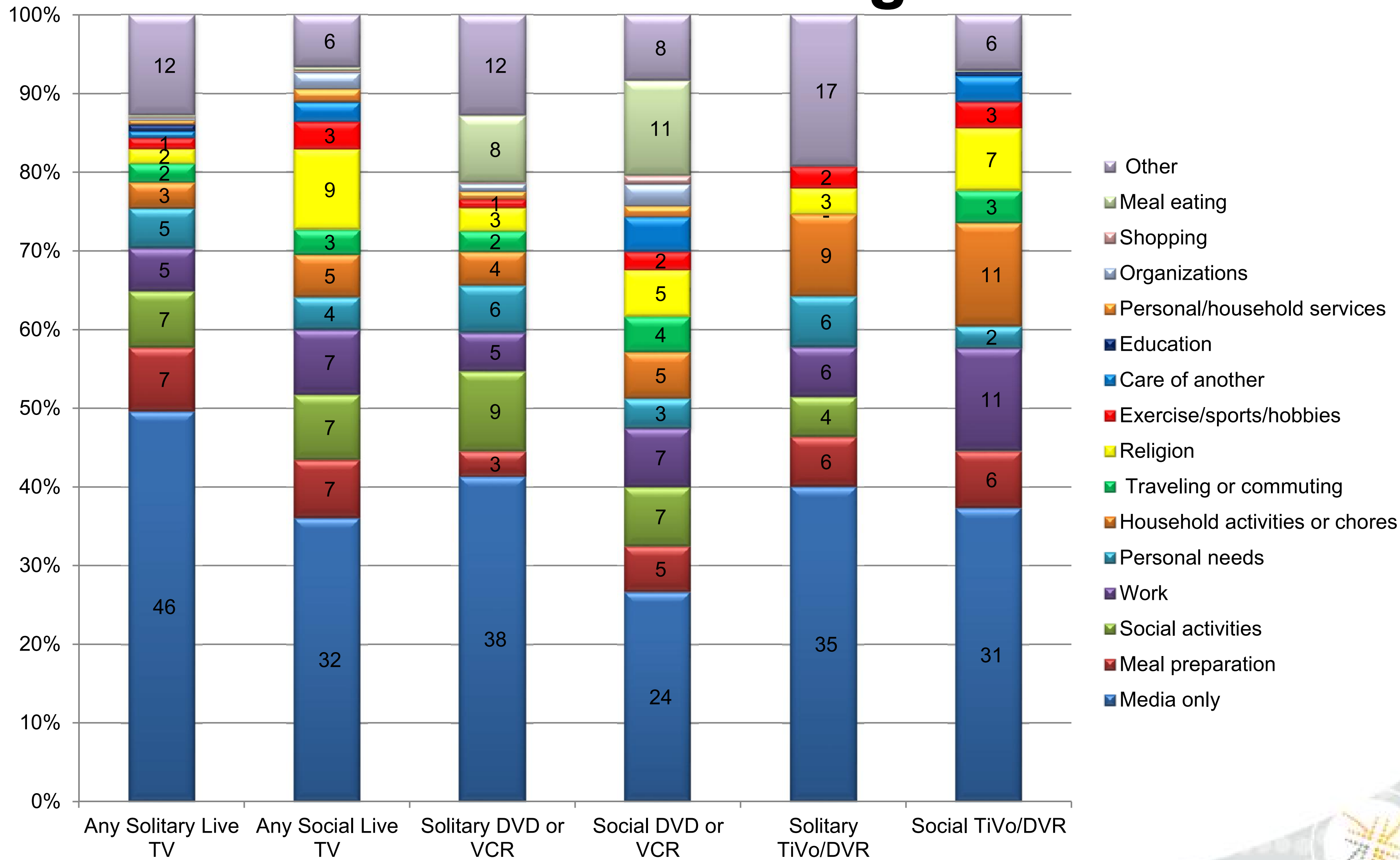
Life Activity Share In Various Solitary Vs. Social Settings



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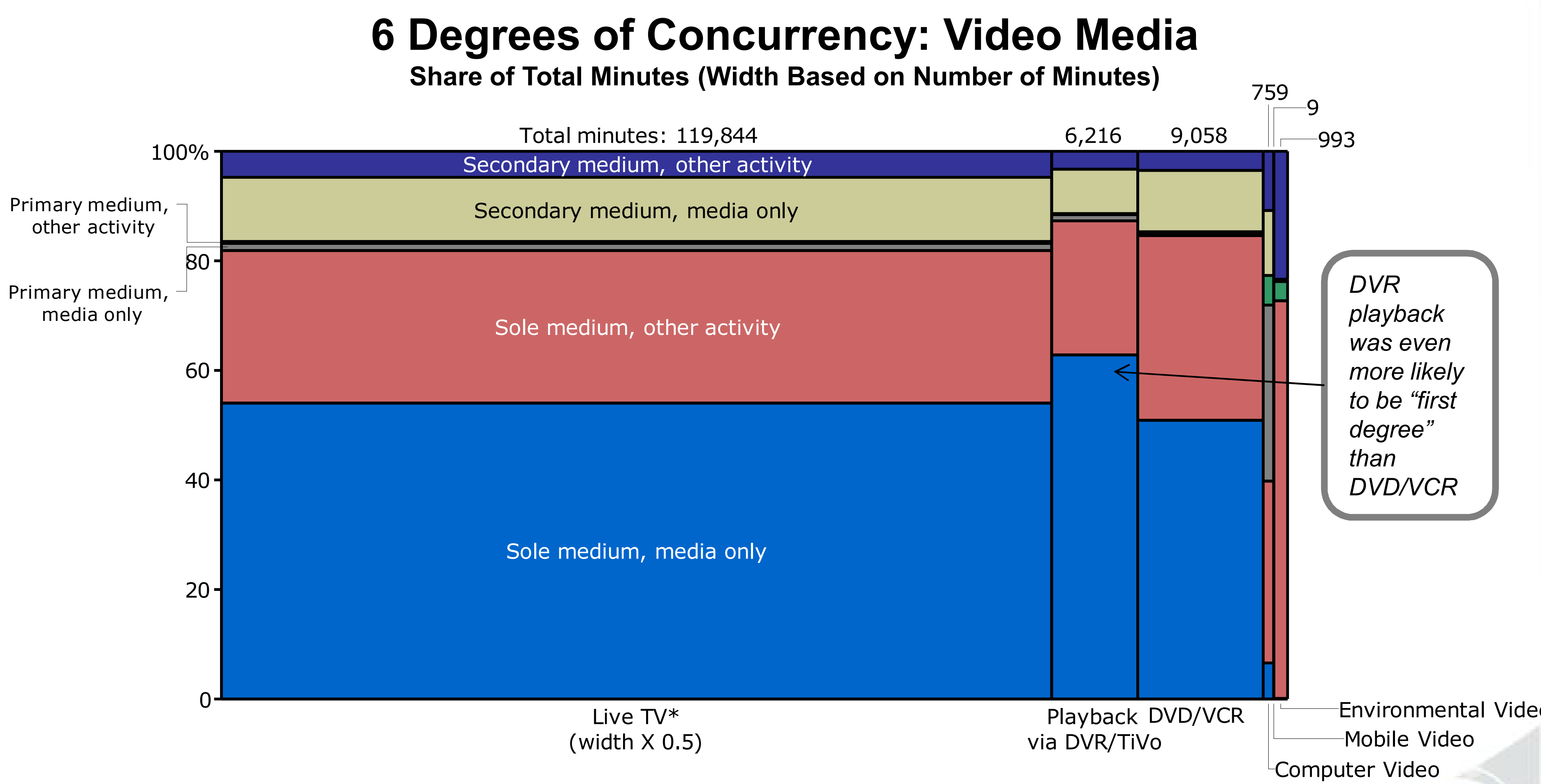
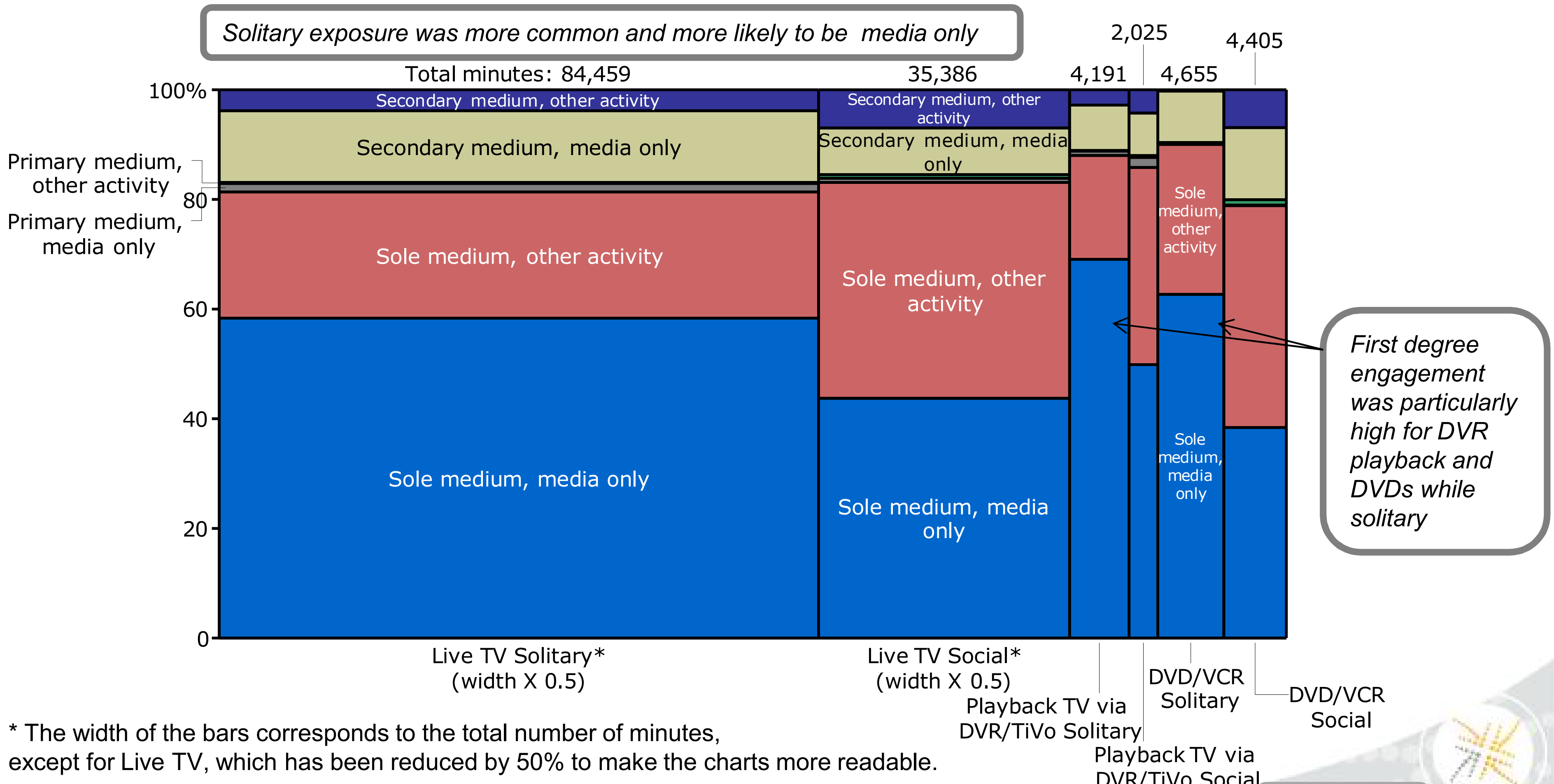
16. Degrees Of Concurrency



* The width of the bars corresponds to the total number of minutes, except for Live TV, which has been reduced by 50% to make the charts more readable.

Contents

6 Degrees of Concurrency: Social Vs. Solitary Video Viewing
Solitary viewing was more common than social and more likely to be media only
Share of Total Minutes (Width Based on Number of Minutes)

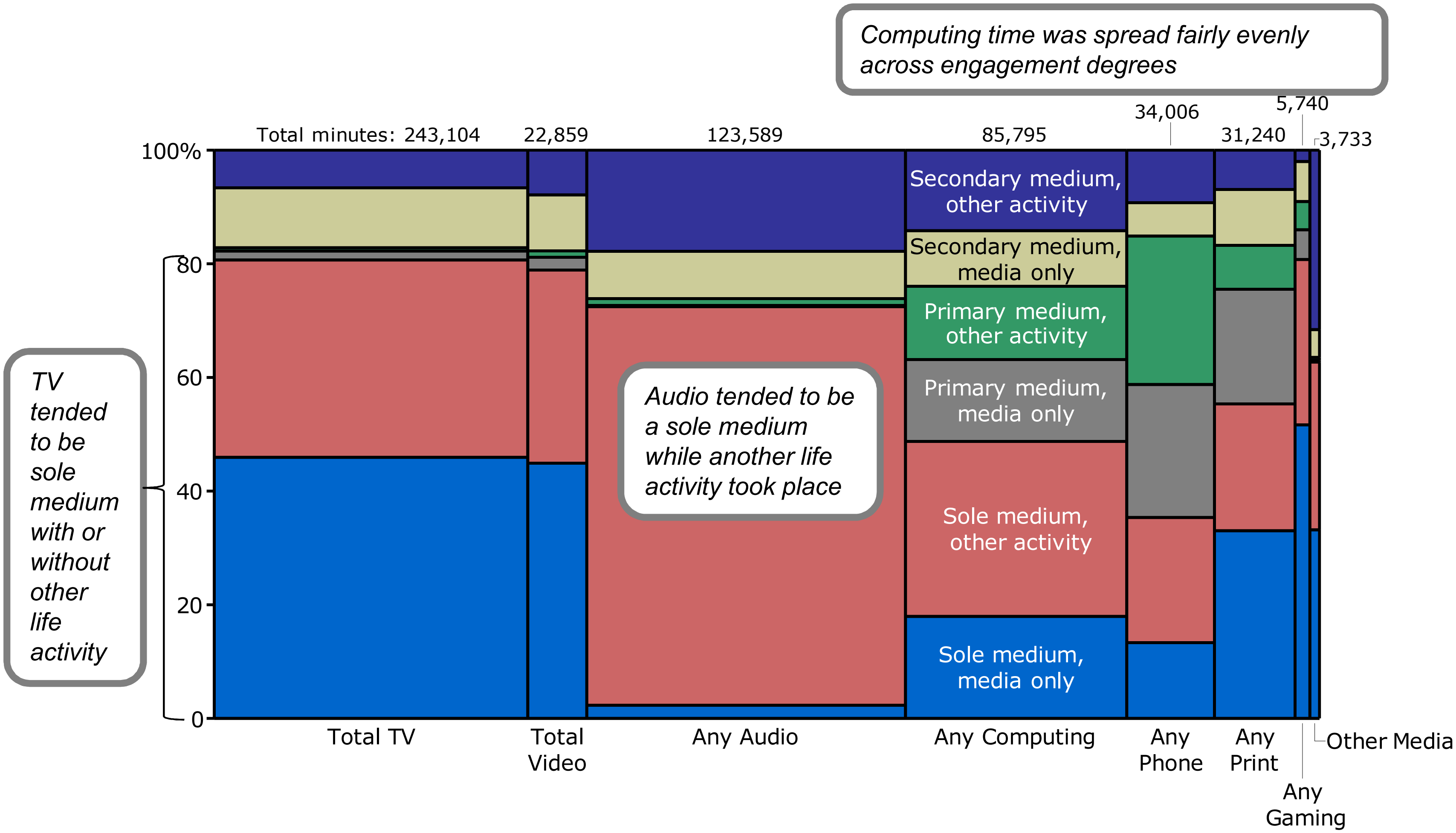


* The width of the bars corresponds to the total number of minutes, except for Live TV, which has been reduced by 50% to make the charts more readable.

Contents

6 Degrees of Concurrency: Major Media

Share of Total Minutes, Core Sample, N=376, Fall '08
(Width Based On Number Of Minutes)



* The width of the bars corresponds to the total number of minutes, except for Live TV, which has been reduced by 50% to make the charts more readable.

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Few Major Concurrent Media Conditions Surpassed What Was Expected By Chance, But Certain Combinations Were Particularly Unlikely To Occur:

- TV with Radio
- Web with Print
- Radio with Print
- Newspapers with Magazines

Blue shading indicates media pairs that are less than expected by chance

Core N=376, Spring '08									
CME Minutes					CME %				
	TV	**Radio**	**Newspapers**	**Magazines**		**TV**	**Radio**	**Newspapers**	**Magazines**
Web	11.0	3.4	0.1	0.0	**Web**	73%	63%	11%	10%
TV		6.5	5.0	2.5	**TV**		20%	113%	128%
Radio			0.8	0.7	**Radio**			53%	95%
Newspapers				0.0	**Newspapers**				23%
Total Minutes	299	106	14	6					
Core N=376, Fall '08									
CME Minutes					CME %				
	TV	**Radio**	**Newspapers**	**Magazines**		**TV**	**Radio**	**Newspapers**	**Magazines**
Web	12.6	2.1	0.2	0.1	**Web**	81%	50%	23%	57%
TV		3.0	4.6	1.6	**TV**		11%	104%	102%
Radio			0.5	0.2	**Radio**			45%	39%
Newspapers				0.0	**Newspapers**				1%
Tot al Minutes	319	87	14	5					

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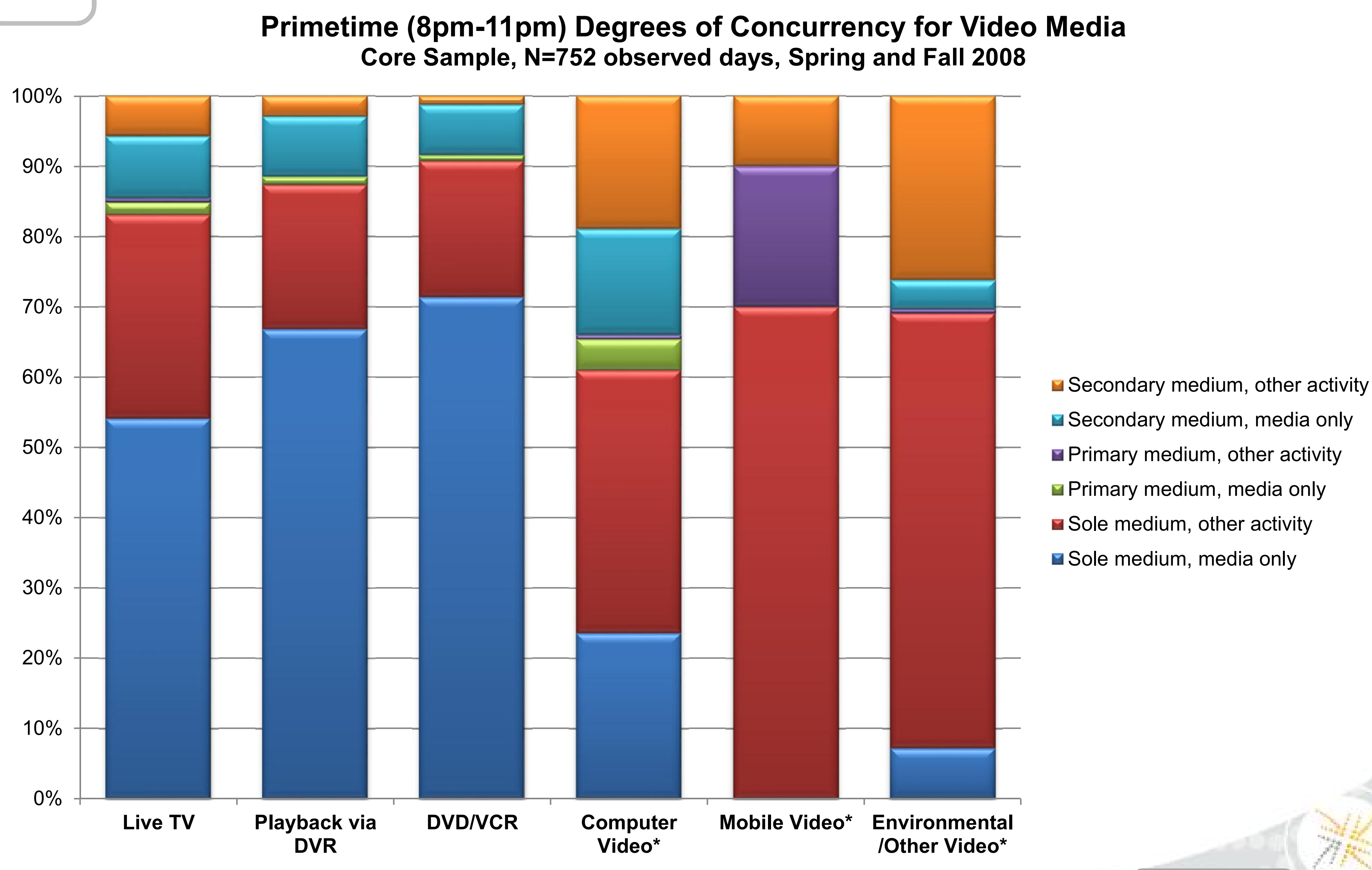
17. Degrees Of Concurrency During Primetime



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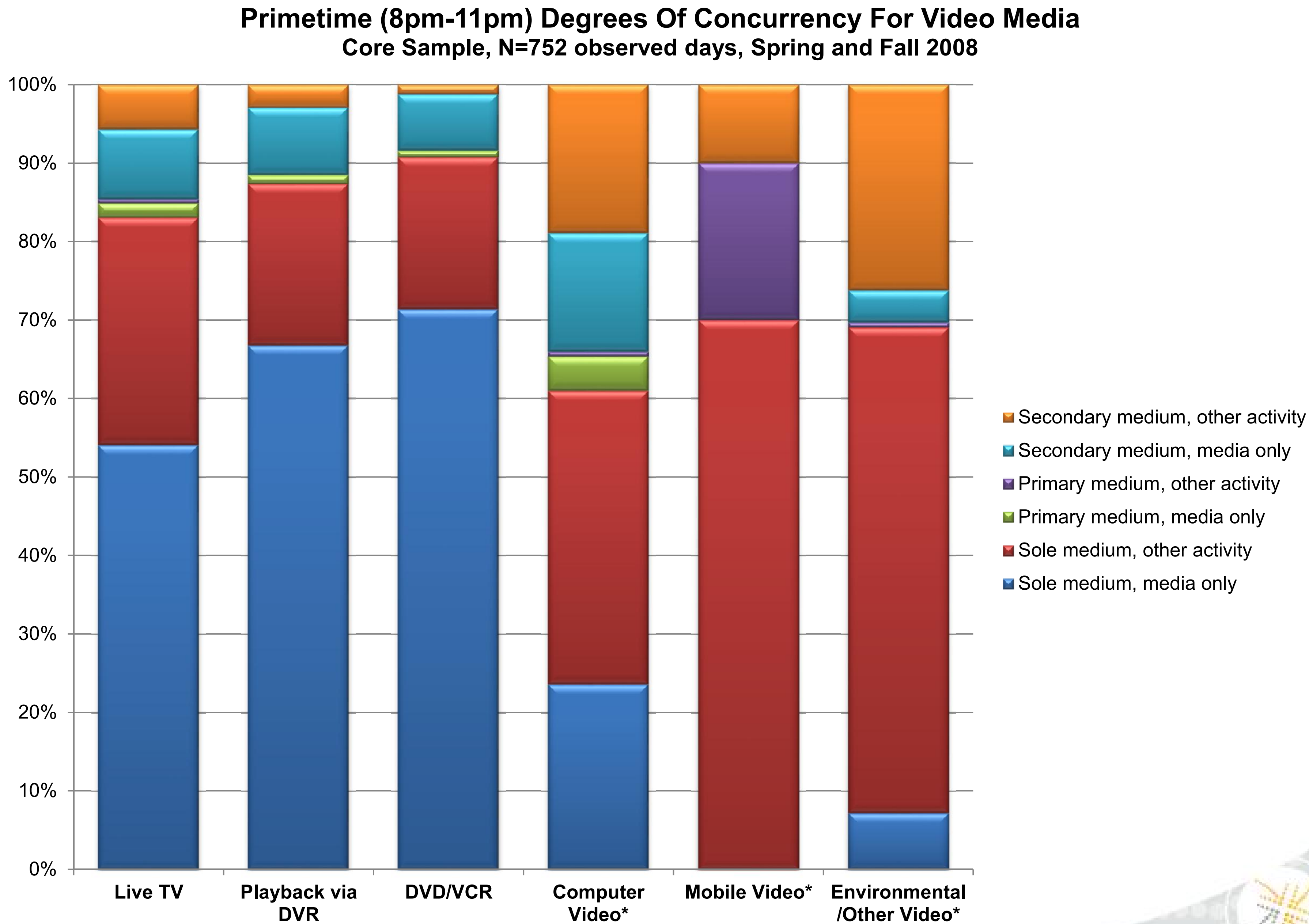

* Very small sample sizes

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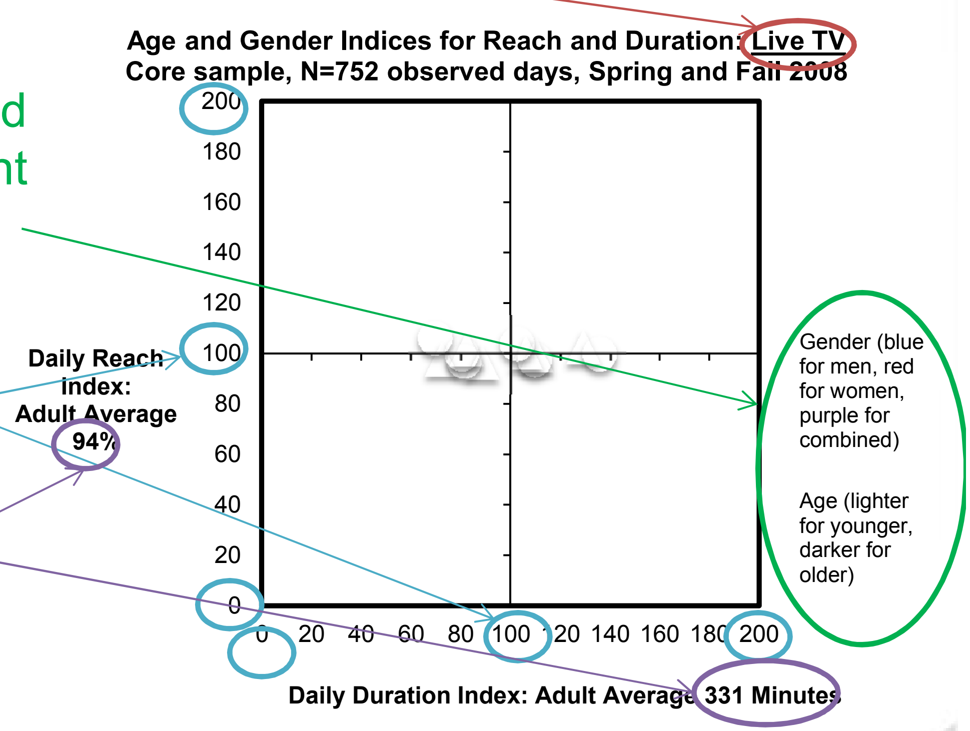
18. Demographic Reach/Duration Index Charts

How to read these charts

- Subgroup comparisons are done consistently on a square grid, showing indices for daily reach and daily duration for one medium per slide
- The subgroups are shown in the legend on right and are represented in different shapes and colors, as well as labeled on the chart
- The numbers range from 0 to 200, where 100 represents the average
- The actual averages for each medium are shown in the axes' labels
- The Excel chart is embedded on the slide, therefore the actual data can be seen by scrolling over the data point when the chart is highlighted (regular view, not full-screen view)

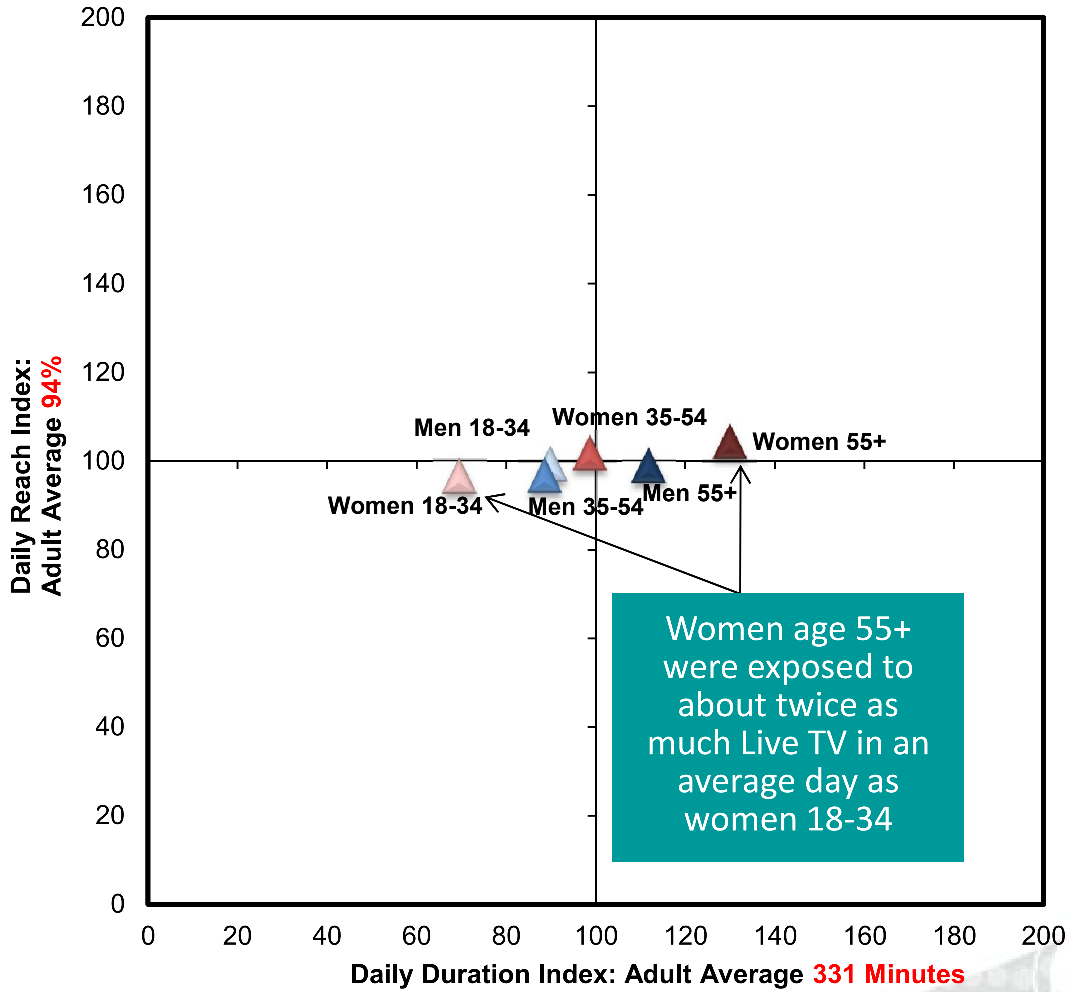


Contents

Age and Gender Indices for Reach and Duration: Live TV

	Daily Reach (%)	Avg. Duration (Min Per User)
Live TV	93.5	330.7
	Reach Index	Duration Index
Men 18-34	99.5	89.8
Men 35-54	97.0	88.7
Men 55+	99.0	111.9
Women 18-34	96.7	69.7
Women 35-54	101.9	98.6
Women 55+	104.5	129.9

Core Sample, N=752 observed days, Spring '08 & Fall '08

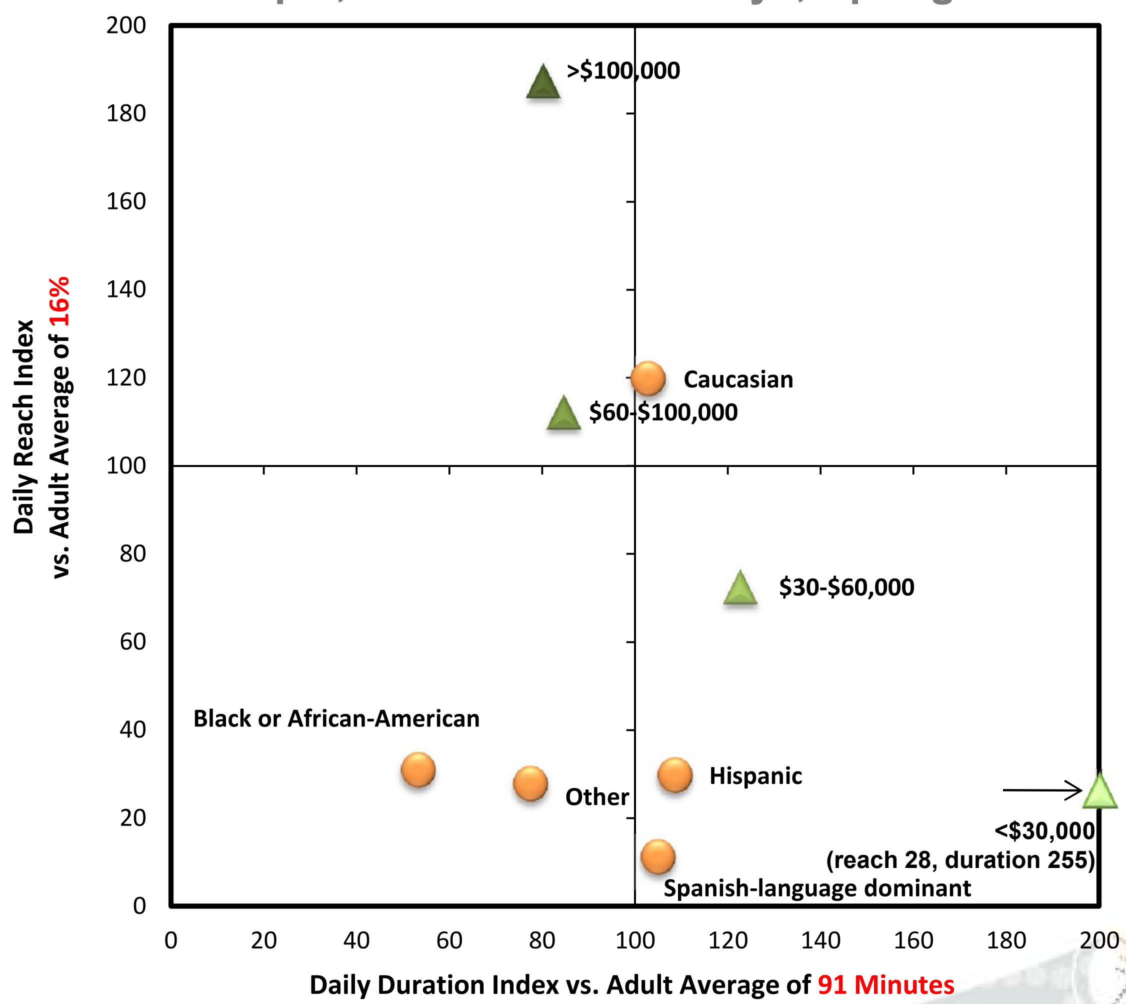


Contents

Income and Ethnicity Indices for Reach and Duration: Playback TV via TiVo/DVR

	Daily Reach (%)	Avg. Duration (Min Per User)
Playback via DVR	16.1	90.6
	Reach Index	Duration Index
<$30,000	28.0	255.2
$30-$60,000	72.7	122.9
$60-$100,000	112.4	84.7
>$100,000	187.6	80.5
Caucasian	119.9	102.9
Black or African-American	31.1	53.1
Other	28.0	77.5
Hispanic	29.8	108.4
Spanish-language dominant	11.2	104.9

Core Sample, N=752 observed days, Spring ‘08 & Fall ‘08

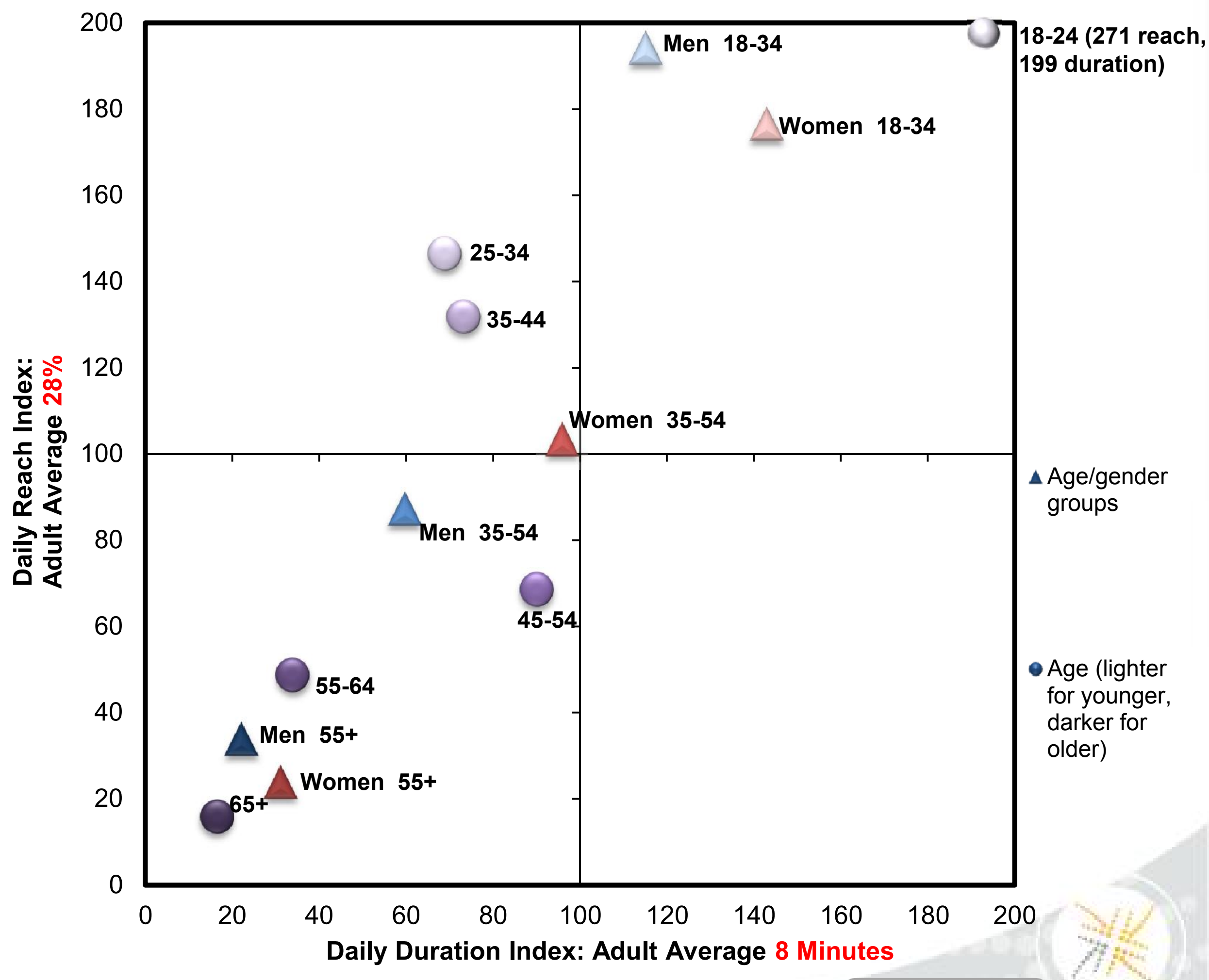


Contents

Age and Gender Indices for Reach and Duration: Mobile Texting

	Daily Reach (%)	Avg. Duration (Min Per User)
Mobile Texting	28.3	7.6
	Reach Index	Duration Index
Men 18-34	194.4	115.2
Men 35-54	87.3	59.6
Men 55+	33.9	22.3
Women 18-34	176.7	143.0
Women 35-54	103.5	95.8
Women 55+	24.0	31.1
18-24	270.7	199.2
25-34	146.3	69.0
35-44	131.8	73.4
45-54	68.6	90.0
55-64	48.8	34.0
65+	15.9	16.5

Core Sample, N=752 observed days, Spring ‘08 & Fall ‘08



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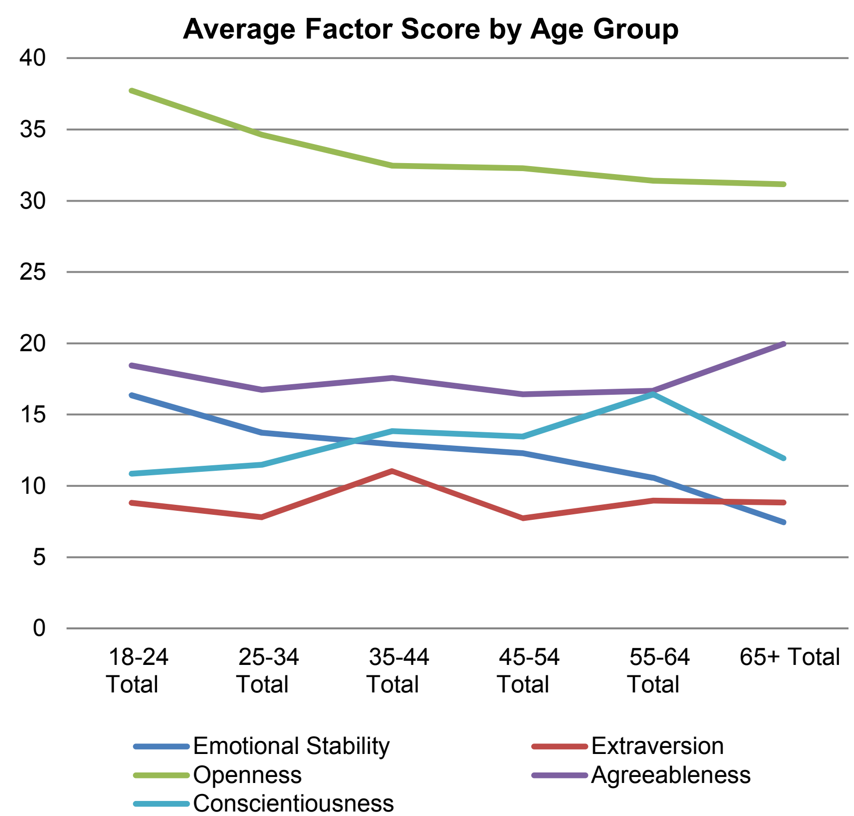
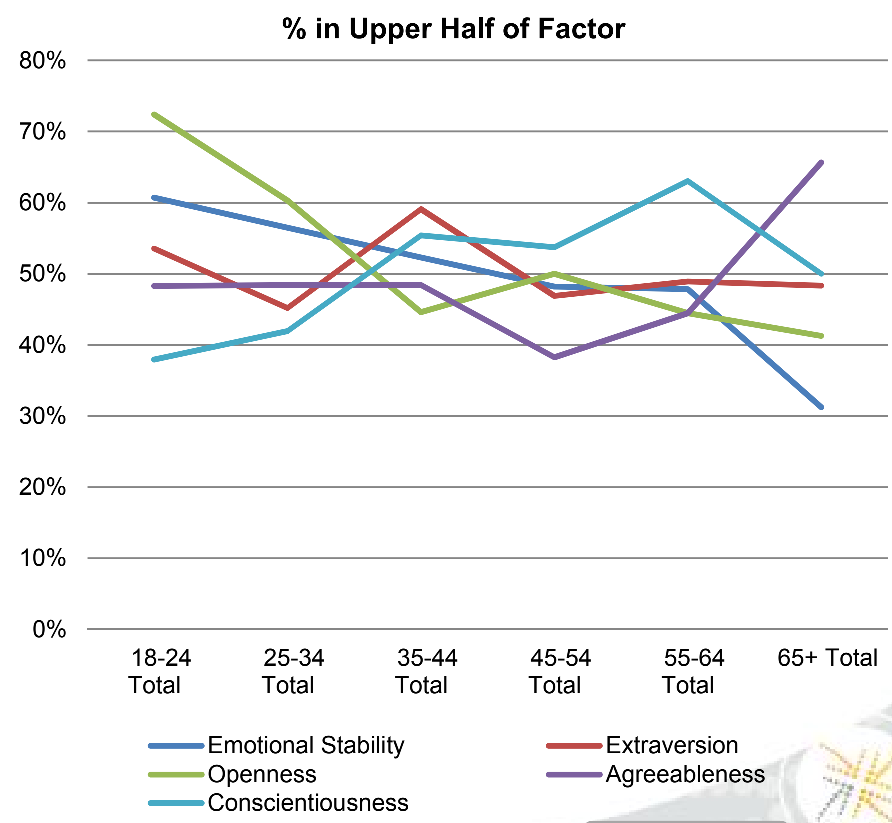
19. Personality Profile Data, Starting With The Big 5 By Age Groups

- Conscientiousness tended to increase with age, particularly in the early years
- Openness decreased with age, also mostly in the early years (consistent with the innovation learning)
- Emotional stability (calm, contented, confident) also declined with age





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Accelerated Participants Differed From The Core In Big 5 Personality Characteristics As Might Be Expected

Accelerated participants were:

- Significantly lower on Emotional Stability (e.g. less calm, contented, confident)
- Significantly higher on Extraversion
- Somewhat higher on Agreeableness

Big 5 Personality Item Table by Mean			
	Acceleration	Core	Significant Test
	Mean	Mean	Sig. (2-tailed)
Emotional Stability	9.27	11.95	.020
Extraversion	11.65	8.84	.027
Openness	32.67	32.86	.845
Agreeableness	19.43	17.57	.063
Conscientiousness	14.33	13.14	.298

Red: Significantly higher
Blue: Significantly lower

Relatively Few Substantial Differences In Reach And Duration Were Noted By Personality Subgroups

The data on this and the following two tables compare those participants in the bottom Vs. the top half for each of the Big 5 scales

Table 2: Reach (%) Core, Both Rounds	Emotional Stability		Extraversion		Openness		Agreeableness		Conscientiousness	
	Low	High	Low	High	Low	High	Low	High	Low	High
Count	362	340	346	348	344	348	360	346	338	360
Any Media Type (Net)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Total TV & Video (Net)	98%	96%	96%	98%	98%	96%	97%	97%	96%	98%
Total TV (Subnet)	94%	94%	92%	95%	96%	91%	93%	94%	92%	95%
Live TV	94%	93%	92%	95%	96%	90%	93%	94%	92%	94%
Playback TV via DVR/TiVo	12%	20%	16%	16%	16%	15%	19%	13%	17%	14%
Total Video (Subnet)	38%	45%	44%	42%	37%	48%	42%	43%	42%	43%
DVD or VCR	25%	24%	23%	26%	22%	28%	23%	25%	22%	26%
Video on Demand/PPV	1%	2%	1%	2%	1%	2%	1%	1%	2%	1%
Computer Video (Sub-subnet)	14%	19%	20%	14%	12%	21%	18%	16%	18%	16%
Digital video stored on computer	2%	4%	3%	3%	2%	5%	4%	3%	4%	3%
Digital video streaming to computer	12%	16%	17%	12%	11%	18%	15%	14%	14%	15%
DVD on computer	1%	0%	1%	0%	1%	1%	1%	0%	1%	0%
Mobile Video (Sub-subnet)	1%	1%	0%	1%	1%	1%	1%	1%	1%	1%
Portable DVD	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Video on personal devices (iPods, PSP, etc.)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Video on mobile phone	1%	1%	0%	1%	1%	0%	1%	1%	1%	0%
Environmental/Other video	8%	12%	10%	11%	10%	11%	9%	11%	12%	9%

Red: Significantly higher
Blue: Significantly lower

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Table 4: Average Minutes (including zeros) Core, Both Rounds	Emotional Stability		Extraversion		Openness		Agreeableness		Conscientiousness	
	Low	High	Low	High	Low	High	Low	High	Low	High
Count	362	340	346	348	344	348	360	346	338	360
Any Media Type (Net)	621	617	614	621	614	621	626	610	619	615
Total TV & Video (Net)	364	343	351	353	375	323	354	350	353	350
Total TV (Subnet)	337	311	319	323	348	290	331	314	326	317
Live TV	327	294	306	310	335	277	313	305	310	307
Playback TV via DVR/TiVo	11	17	14	14	13	14	18	9	16	10
Total Video (Subnet)	27	32	31	30	27	35	23	37	27	33
DVD or VCR	21	24	24	22	20	26	17	27	20	25
Video on Demand/PPV	0	1	0	1	0	2	1	1	1	0
Computer Video (Sub-subnet)	2	2	2	2	2	3	2	2	3	2
Digital video stored on computer	0	0	0	1	0	1	1	0	0	0
Digital video streaming to computer	2	2	2	2	1	2	2	2	2	2
DVD on computer	0	0	0	0	0	0	0	0	0	0
Mobile Video (Sub-subnet)	0	0	0	0	0	0	0	0	0	0
Portable DVD	0	0	0	0	0	0	0	0	0	0
Video on personal devices (iPods, PSP, etc.)	0	0	0	0	0	0	0	0	0	0
Video on mobile phone	0	0	0	0	0	0	0	0	0	0
Environmental/Other video	4	5	4	5	5	4	3	6	3	6

Table 5: Average Minutes (excluding zeros)=Duration Core, Both Rounds	Emotional Stability		Extraversion		Openness		Agreeableness		Conscientiousness	
	Low	High	Low	High	Low	High	Low	High	Low	High
Count	362	340	346	348	344	348	360	346	338	360
Any Media Type (Net)	621	617	614	621	614	621	626	610	619	615
Total TV & Video (Net)	372	355	364	361	383	337	365	361	368	356
Total TV (Subnet)	357	332	345	340	363	317	354	333	353	333
Live TV	347	317	333	327	350	306	338	326	337	326
Playback TV via DVR/TiVo	88	86	84	89	82	89	98	72	95	70
Total Video (Subnet)	70	71	71	72	72	71	56	86	65	78
DVD or VCR	84	101	106	82	91	94	76	108	90	96
Video on Demand/PPV	27	80	77	64	0	89	49	97	68	64
Computer Video (Sub-subnet)	16	12	12	16	14	14	14	14	15	13
Digital video stored on computer	15	10	9	17	16	11	20	4	10	15
Digital video streaming to computer	14	11	11	14	12	13	11	15	14	11
DVD on computer	34	16	24	NA	21	34	27	30	27	30
Mobile Video (Sub-subnet)	11	3	1	8	6	9	4	10	3	15
Portable DVD	22	NA	NA	22	22	NA	NA	22	NA	22
Video on personal devices (iPods, PSP, etc.)	NA	8	NA	8	NA	8	8	NA	8	NA
Video on mobile phone	5	1	1	3	1	9	1	5	1	9
Environmental/Other video	48	38	44	45	52	37	30	56	28	64

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Not Surprisingly, The Acceleration Group Was Dramatically Higher Than The Core In Innovativeness

Innovativeness Item Table by Mean	Acceleration	Core	Significant Test
	Mean	Mean	Sig. (2-tailed)
Interested	2.05	2.79	.000
Eager	2.24	3.12	.000
Wait to Buy	2.07	2.12	.726
Buy Soon	3.18	3.87	.000
On Lookout	2.60	3.51	.000
Not Take Chance	3.72	3.26	.001
Very Curious	1.94	2.78	.000
Among First	3.24	4.05	.000

Note: smaller numbers indicate higher innovativeness

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20. Yankelovich Media Uses & Gratifications Battery

The following slides contain:

- Overview and summary of Yankelovich Media Uses & Gratifications (U&G) battery and data
- Applying Yankelovich Media U&G to the VCM study
- VCM study media U&G results

Yankelovich Uses & Gratifications Data To Provide Some Context

Yankelovich U&G Factors	Relaxation Recreational	Empowerment	Informational	Connection
Illustrative VCM measure	Entertainment 	Control 	Information 	Connection 
Wording	“To be entertained”	“It puts me in control”	“To keep up with what’s going on in the world”	“To connect with friends, family or others
Ranking of 5 major media in terms of high agreement (5-7 on 7 pt scale) in Yankelovich media usage and gratification battery	47% YouTube/Video 39% TV 39% Radio 39% Magazines 33% Search Engine 26% Newspaper 26% Internet Banner	36% Magazines 36% Search Engine 36% YouTube/Video 33% Newspapers 28% Internet Banner 26% Radio 22% TV	41% Newspapers 32% Search Engine 31% YouTube/Video 29% Magazines 25% Internet Banner 16% TV	24% YouTube/Video 18% Search Engine 16% Magazines 14% Internet Banner 13% Newspapers 10% TV 8% Radio
Conclusion	TV Relatively High on Entertainment ratings	TV the lowest on control ratings	TV the lowest on information ratings	TV among the lowest on connection ratings

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Learning From VCM Data On Yankelovich Media Uses & Gratifications Battery

Yankelovich-like U&G Factors	Core findings from 8 TV and Video media for which U&G battery questions were asked
Entertainment *"To be entertained"*	All 8 TV and Video media score relatively high and relatively similarly on Entertainment, which is where TV has been strong in earlier Yankelovich research.
Control "*It puts me in control"*	Previous research has ranked TV as relatively low in Control (vs. Search engines, which are high). The only media measured substantially different in this study is Out of Home TV, which is particularly low in Control.
Information *"To keep up with what's going on in the world"*	In previous research TV has tended to be rated relatively low on Information (vs. Newspapers, which are high). Relative to Live TV in this study, the other TV/Video media are rated lower, particularly VOD and DVD.
Connection *"To connect with friends, family or others"*	Previous research has shown TV rated relatively low on Connection (vs. YouTube, which is rated high). The only medium rated relatively high on Connection was Out of Home TV.
Main Conclusions	1) Out of Home TV differs the most from the other 7 TV/Video media: Lowest on Control and highest on Connection 2) We would encourage other media beyond TV and Video to also be rated in future research, in order to provide suitable reference and context information

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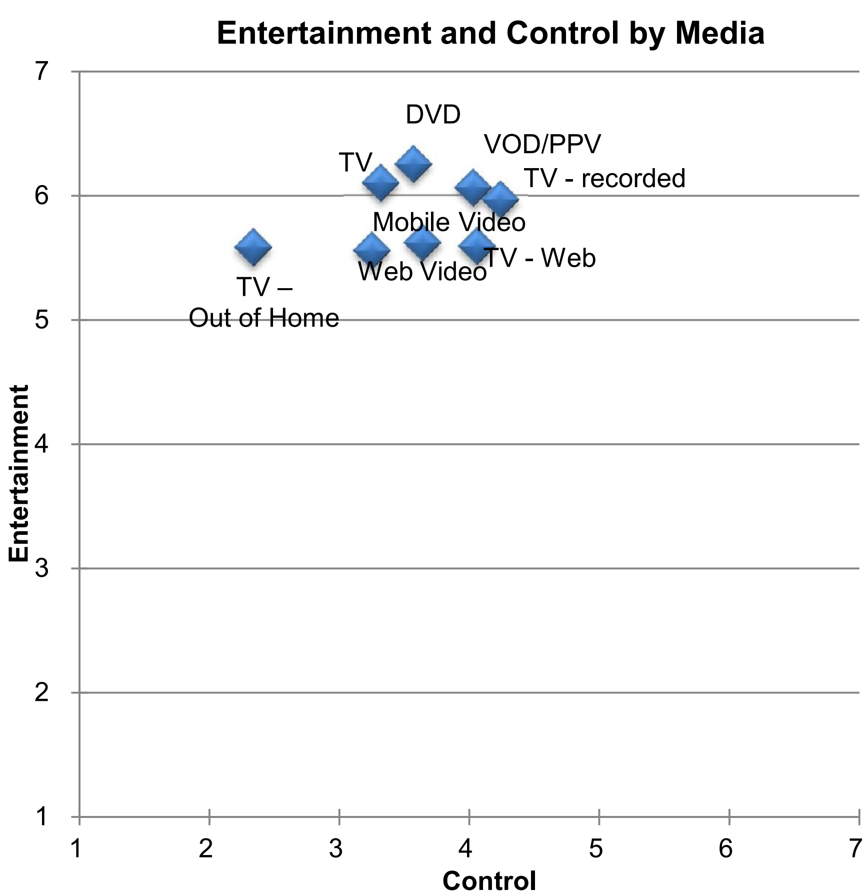
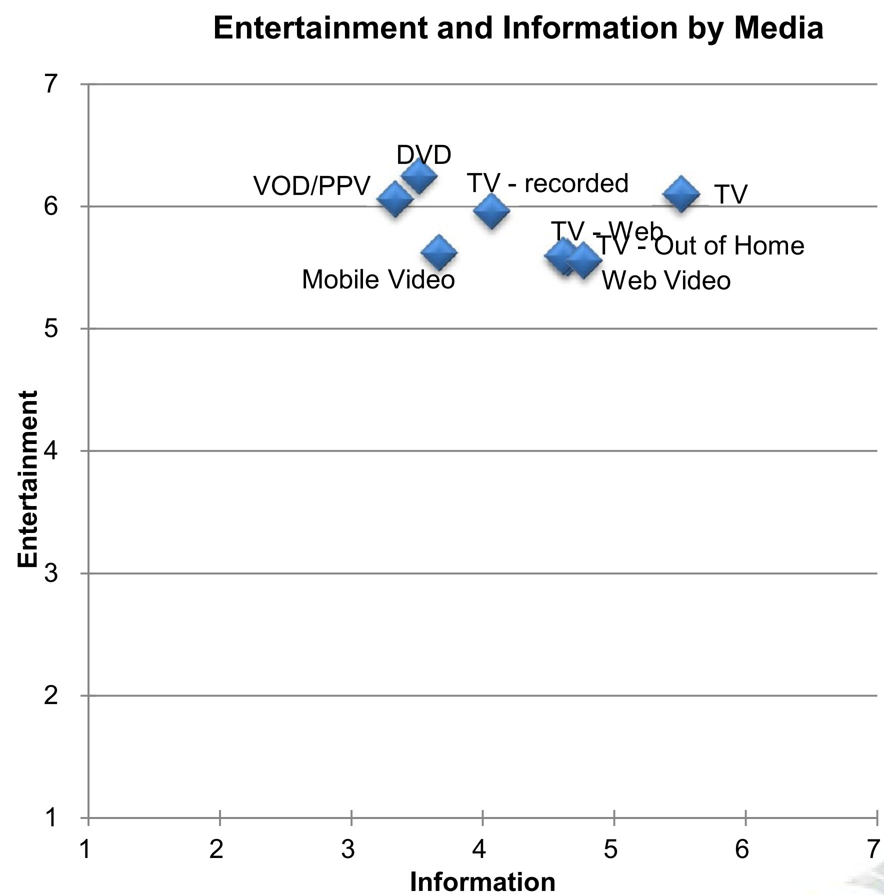
TV And Video's High Entertainment Value Was Clear





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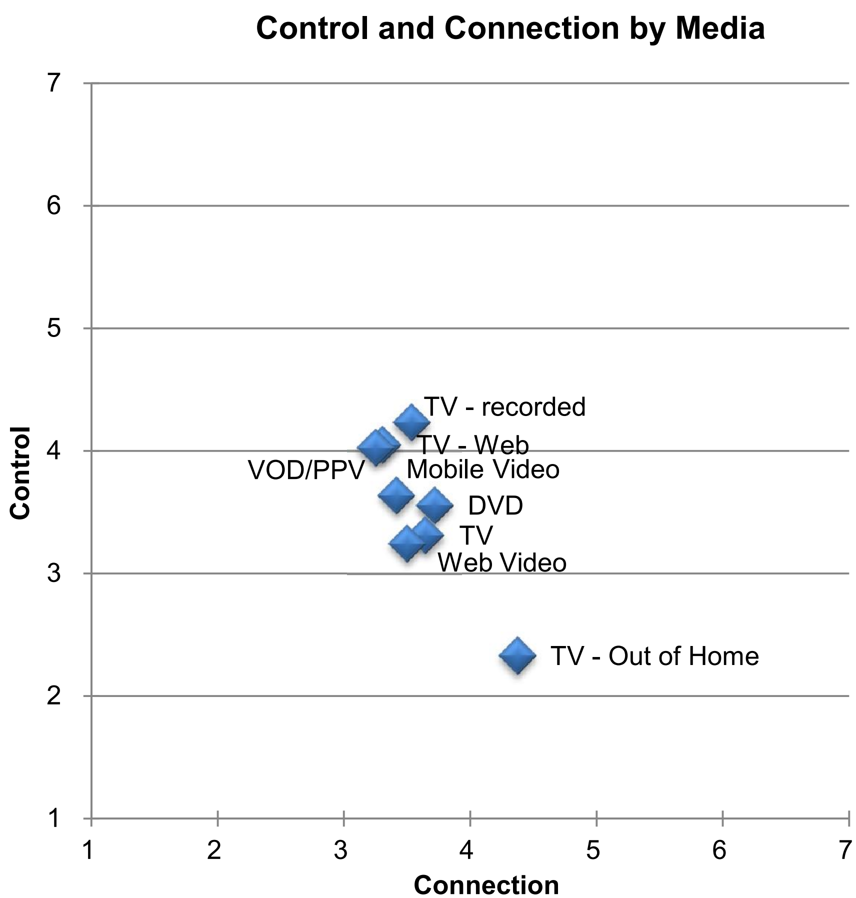
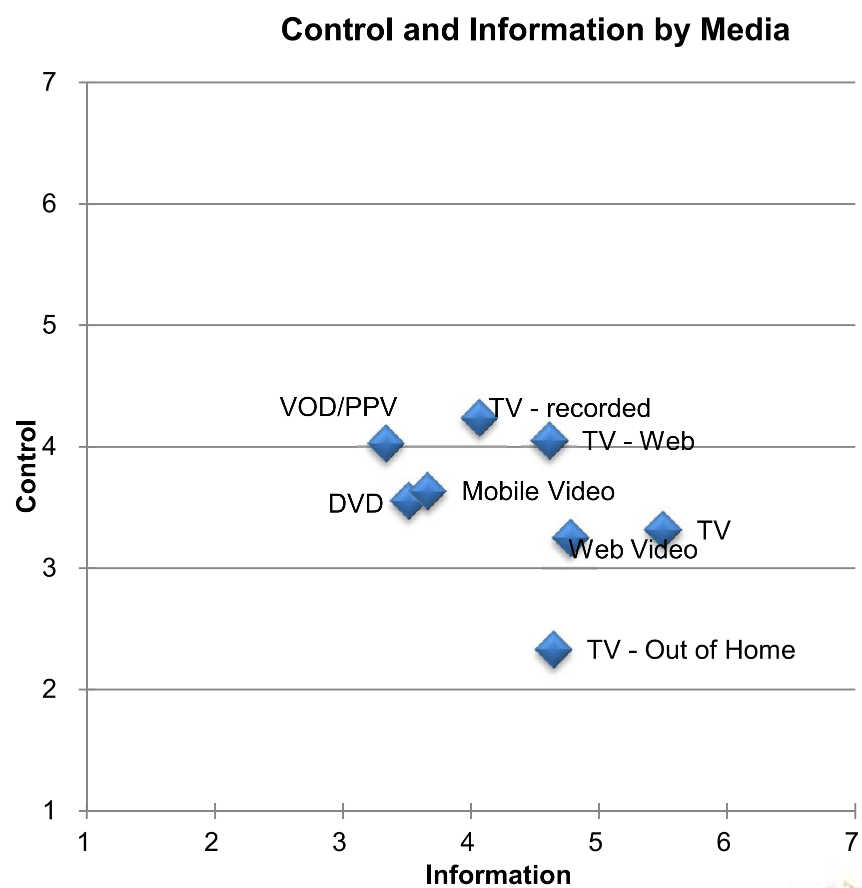
Out Of Home TV Was Lowest On Control





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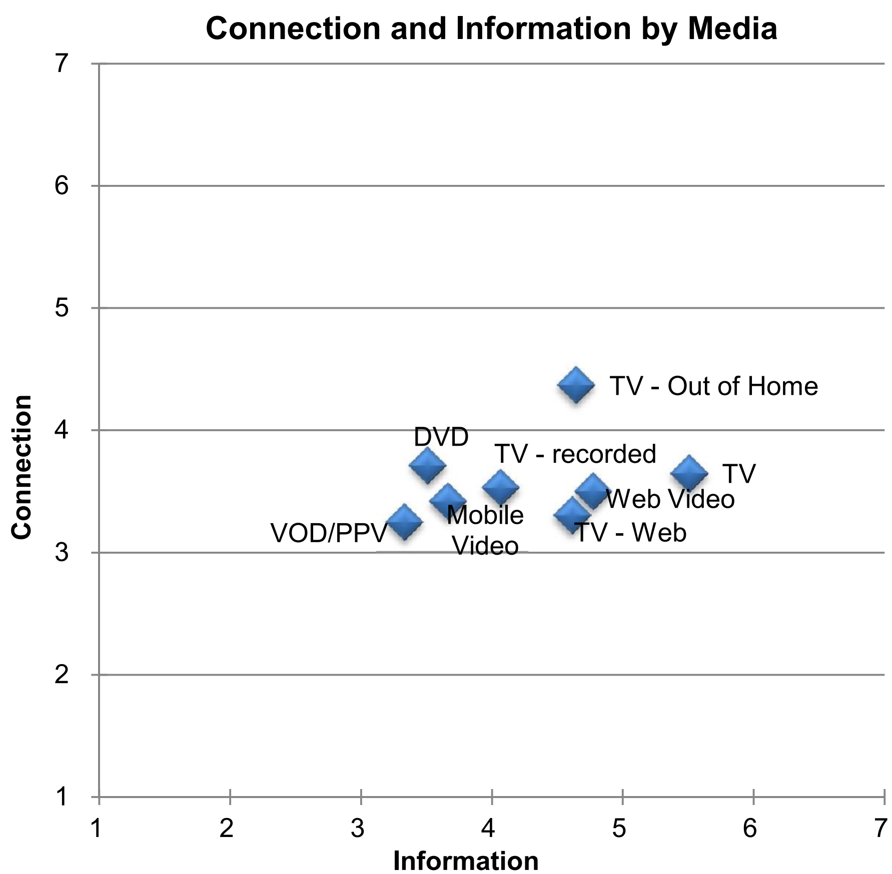
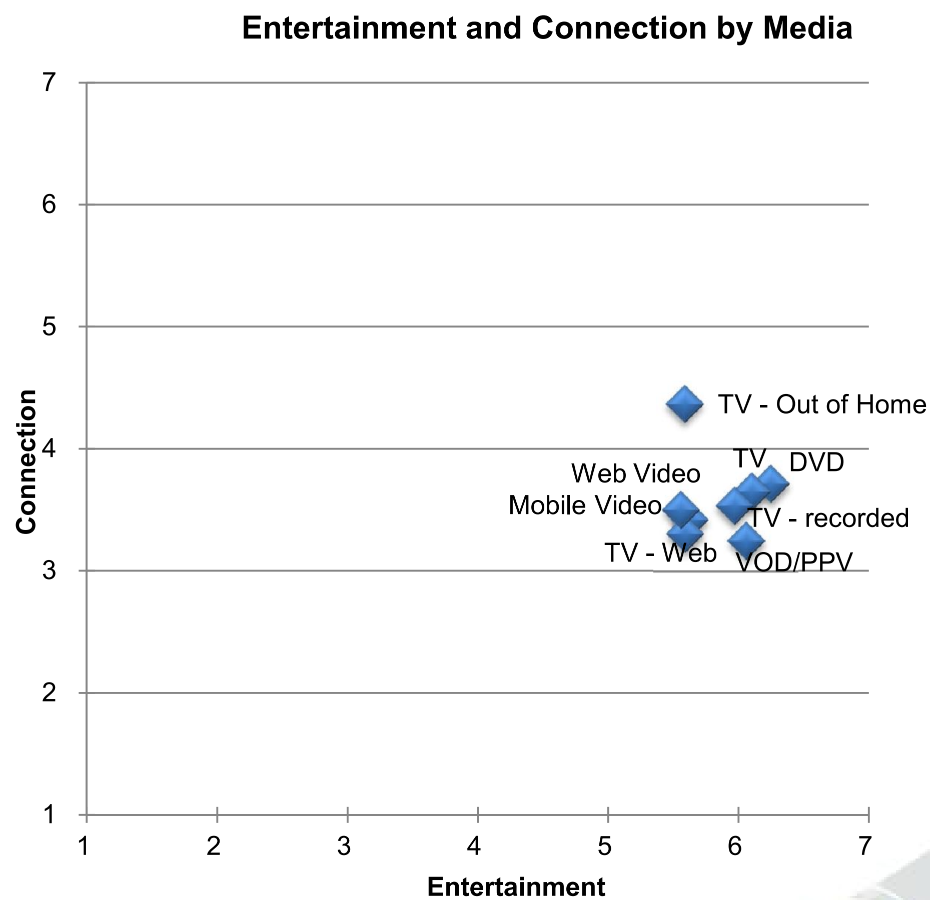
TV Was Highest For Information, Out Of Home TV Highest For Connection





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All 14 Individual Item Means From The Yankelovich Media U&G Battery

Uses & Gratifications Item Table by Mean Score, ranked by TV scores	1st screen				2nd screen		3rd screen	4th screen
	TV	TV - recorded	DVD	VOD/PPV	Web Video	TV content on Web	Mobile Video	TV - Out of Home
To be entertained	6.11	6.02	6.30	6.09	5.69	5.60	5.75	5.63
To keep up with what's going on in the world	5.52	4.19	3.44	3.20	4.73	4.65	3.97	4.60
It helps me unwind	5.52	5.25	5.43	4.92	3.81	4.30	4.44	4.32
To pass the time	5.19	4.77	4.91	4.83	4.25	4.27	5.22	4.99
To satisfy my curiosity about something	5.18	4.60	4.28	4.08	5.49	5.20	4.07	4.07
It's fun	5.13	4.90	5.49	4.92	5.12	4.79	4.87	4.73
It offers me things that are personally relevant to me	4.96	4.95	4.56	4.25	4.71	5.04	4.29	3.83
To feel that I am staying on the cutting edge of things	3.83	3.24	3.02	2.80	3.61	3.54	3.28	3.04
I feel completely immersed in the experience it gives me	3.75	3.58	3.99	3.43	2.96	3.29	3.30	3.17
To connect with friends, family or others	3.63	3.55	3.74	3.24	3.52	3.20	3.26	4.49
To find something in common with others	3.51	3.22	3.34	2.96	3.43	3.10	2.94	4.27
I trust it	3.36	3.14	3.06	2.88	2.60	3.14	3.16	2.86
It puts me in control	3.29	4.56	3.68	4.04	3.33	4.15	3.62	2.25
It's cool	3.08	3.32	3.21	3.20	3.59	3.62	3.83	3.03

Note: Questions answered on a 7 point scale

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21. What The Future Brings: Age, Innovation And Acceleration - Based Analysis/Predictions

Age Group and Innovation Subgroups Suggest The Same* Future Trends

Identical Findings

By comparing the youngest and oldest age group

By looking at the most innovative groups (breakouts and early adopters) as leading the way

	Poised for some decline	Poised for some growth
First Screen	- Live TV	+ DVR Playback + DVD + Console games
2nd Screen		+ All Computer Media
3rd Screen		+ All Mobile Media
4th Screen		+ Environmental Media
Other media	- Print - Landline Phone	+ Audio

*This assumes following generations' behavior is most like those 18-24 and that 18-24 don't "outgrow" their behavior, though audio behavior could conceivably be outgrown

From the Acceleration learning, one aspect of the short term future is clear: HDTV adoption will contribute to TV growth, some of it temporary

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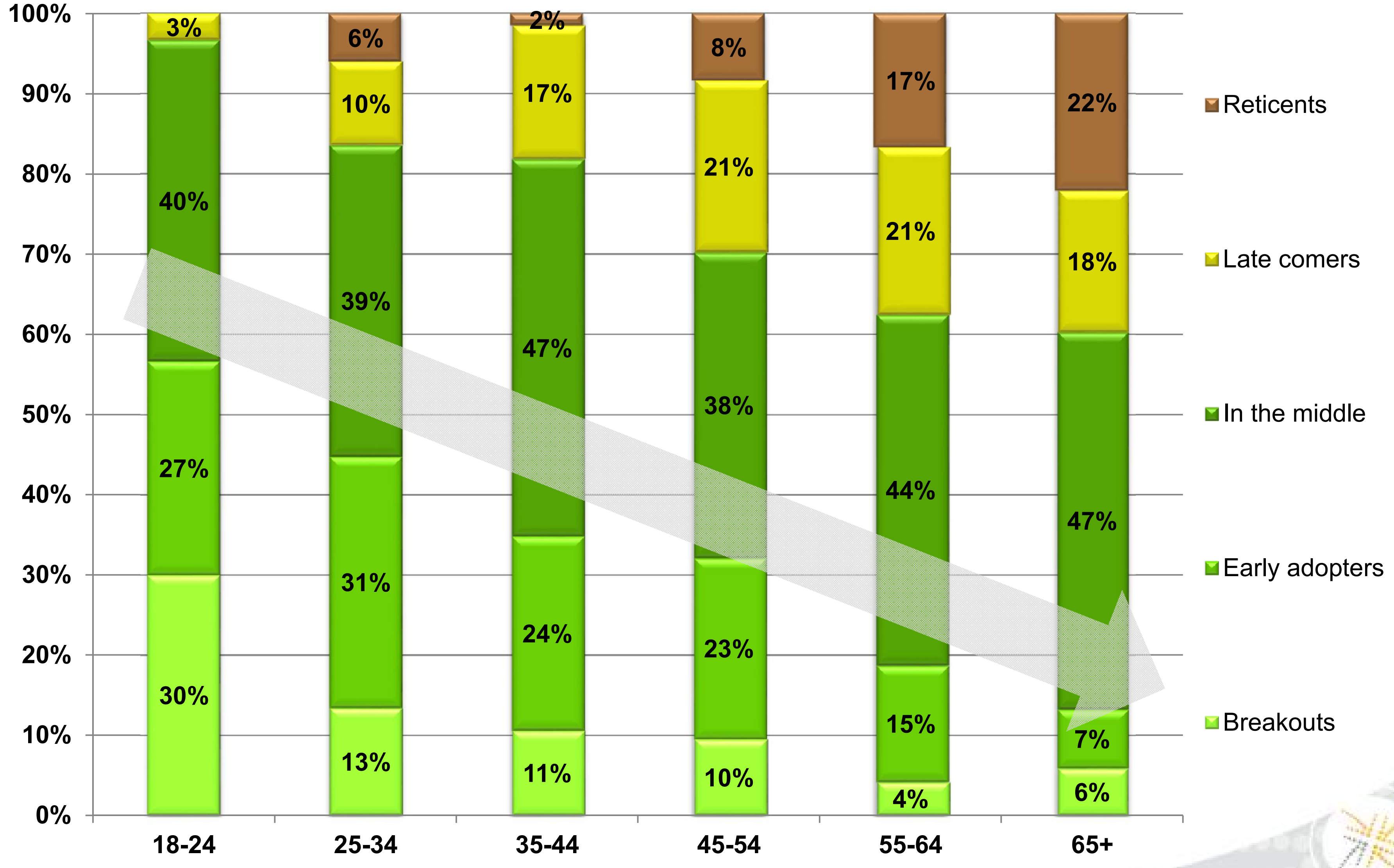
Innovation Segments

- **Innovation diffusion**: The notion that adoption of a new technology or practice proceeds over time according to the size and dominant characteristics of the adopting group in a given time frame, from "early adopters" to "laggards or resisters." The model is most associated with the work of communication scholar Everett Rogers. The traditional adoption curve describes five groups (with assumed approximate normal distribution noted):
  - **Innovators** (2.5%): venturesome, "cutting edge" and "first to have"
  - **Early Adopters** (13.5%): judicious, influenced by innovators, often are opinion leaders.
  - **Early Majority** (34%): first to follow at the "tipping point" towards mass adoption
  - **Late Majority** (34%): more cautious; adoption influenced by social or economic pressures
  - **Laggards** (16%): may be resistant, traditional, suspicious or isolated from opinion leaders.
- The Innovation scheme used in this study had similar groups labeled: Breakouts, Early adopters, In the middle, Late comers, Reticents

Innovation Decreased Consistently With Age



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A Final Glimpse into the Crystal Ball After VCM Study

- All things considered, what is most clearly suggested for the 4 screen future
  - More TV with HDTV adoption (though some of it temporary)
  - More DVR playback (though not as much more as some suggested)
  - More DVDs (based largely on population use of those under 45)
  - More computer, mobile and environmental video
- However the media fragmentation within the 4 screens, and a possible average "ceiling" of the total 4 screen time of 8 ½ -9 ½ hours including concurrent media exposure (and 6-7 hours excluding it) suggests an even more complex and dynamic interplay of competitive media forces than ever

22.

Digital Transition Questionnaire Summary

1. Almost all participants ***(97%)*** were aware that over-the-air television would be switching to an all-digital format.

2. About ***85%*** of the total participants reported knowing when the transition would occur. About ***65%*** of the total participants correctly reported, at that time, that the transition would take place in Feb-2009.

3. Most of the participants ***(81%)*** reported hearing about the transition on television, followed by newspapers ***(13%)***, radio ***(10%)***, friend/family member ***(10%)*** and the Internet ***(6%)***. Only **2%** of total respondents mentioned that they heard about the digital transition from their service providers.

4. How did the respondents think the transition would change broadcast TV? ***32%*** of them reported they didn't know. ***21%*** thought the transition would lead to better picture quality, ***7%*** thought it would lead to better sound quality, ***6%*** thought it would offer more channels, ***4%*** thought it would offer more reliable signal and ***3%*** thought there would be less interference.

5. Only ***21%*** of total respondents reported that the upcoming digital transition impacted the type of equipment they purchased. ***7%*** of total respondents made a TV set purchase and very few decided to get a cable/satellite upgrade.

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Digital Transition Questionnaire Summary

6. Almost all participants ***(97%)*** had a TV in their home ready to receive digital over-the-air broadcast signals via antenna. And ***76%*** of total respondents said they would upgrade their TVs to receive digital signals via antenna.
7. ***8%*** of respondents planned to purchase a converter box (most of them specified that they would buy it for ***one*** TV); ***7%*** planned to purchase a new TV set with digital tuner and switch from broadcast only to cable or satellite service; finally, ***7%*** of respondents already had cable or satellite service.
8. ***7%*** of respondents specified when they would upgrade their TV sets. According to them, most of the upgrade would take place from ***Oct-2008*** to ***Jan-2009***.
9. ***17%*** of total respondents had upgraded some or all of the TV sets in their home. Among them, a little over a half upgraded ***some*** of their TVs and almost a half upgraded ***all*** of their TVs.
10. ***6%*** of total respondents had purchased a converter box before, half of whom purchased it for ***one*** TV only; ***8%*** of total respondents had purchased new TVs with digital tuner (most of them purchased only ***one)***; in addition, ***7.4%*** of total respondents had switched from broadcast only to cable or satellite before (about half made the switch for ***all*** of their TVs).

Digital Transition Questionnaire Summary

11. More than half ***(69%)*** of the ***12%*** of the respondents who purchased a converter box for antenna or a new TV with a digital tuner felt the upgrade was very easy.
    - Almost half of the participants, who purchased a converter box, did the upgrade in the last three months.
    - Most of them felt it was very easy to use the government converter coupon program.
12. About 1/3 of the respondents who had upgraded some, but not all of the TV sets in their home ***(8%)***, said they would upgrade any of their remaining non-digital-ready TVs to receive digital broadcast TV via antenna.
13. Nearly all of the ***3%*** of total respondents who said they would upgrade their remaining TV sets, planned to purchase a converter box and half of them planned to purchase the converter box for ***some*** of their TV sets.
14. Half of the ***3%*** of total respondents who said they would upgrade their remaining TV sets, reported that they would upgrade in ***Dec-2008.***

23. Additional Measurement Analyses

1) About the same time Ball State/Sequent was finalizing the first wave data cleaning and starting to generate tabulations……

"Apples To Apples" Comparison Of In-home TV Viewing: VCM Vs. Nielsen's Three Screen Report For May, 2008

2) Nielsen released the Three Screen Report for May, 2008

3) The top table is entirely from that Three Screen Report

Comparability of Video Consumer Mapping data with Nielsen PeopleMeter TV viewing data

Total		All Adults By Age					
		18-34		35-54		55+	
Core sample	Total adults	18-24	25-34	35-44	45-54	55-64	65+
% of larger age group		42%	58%	49%	51%	48%	52%
Nielsen in-home May TV time (hr : min)		103:27:00	118:59:00	124:01:00	145:03:00	159:59:00	177:50
Minutes for 28 days		6207	7139	7441	8703	9599	10670
Minutes per day		222	255	266	311	343	381
Nielsen minutes for broad age groups		241		289		363	

4) The in-home TV data in that report is actually shown this way, e.g. 177 hours and 50 minutes for the 28-day "May" period for people age 65+ on average

5) The bottom 3 rows are simply to translate that data into minutes per day for 3 broad age groups and the answer is

241 Mins/day For those 18-34

289 Mins/day For those 35-54

363 Mins/day For those 55+

6) The next table shows

VCM data in mins in total

Core sample	Total adults	18-34	35-54	55+
Base: Total Respondents	390	102	155	114
Total TV: Live + Playback (Means Excl. Zero)	333	258	326	396
Total TV: Live + Playback (Means Incl. Zero)	313	243	303	378
Own Home Total TV (Means Excl. Zero)	305	237	299	363
Own Home Total TV (Means Incl. Zero)	287	223	278	347
Nielsen minutes for broad age groups		241	289	363
Index Total TV (VCM Excl. Zero/Nielsen)		0.98	1.04	1.00**
Index Total TV (VCM Incl. Zero/Nielsen)		0.93	0.96	0.96**

Comparing

Comparing

Comparing

	TV total	In Home Net
Total minutes	122096	112096
		92%

7) A simple adjust-ment to get from TV total to Own Home total TV

* This has been applied uniformly to the three age groups' data to arrive at the Own Home Total TV minutes to the left.

** Note: Appropriate comparison would be between these two rows (within about 3% overall), subject to possible refinements to simplifying assumptions on the following page.

8) From bottom line of the table on top

9) Excluding and including Zero has to do with definition of TV users, about 94% on a daily basis; over 98% on a monthly basis

10) All those numbers range from **7%** below the Nielsen numbers to **4%** above

11) There-fore within 3% overall.

The Fine Print: Simplifying Assumptions

Since then this has been checked and adjusted

- We assume the Nielsen 3 screen report TV data would be very similar if expanded from Nielsen's "May" period of 4/28/08-5/25/08 to the VCM's "April-May" period of observation (actually starting the last week of March and ending the first week of June).

Since then this has been checked and adjusted

- We assume the 3 screen national TV data would be very similar to the 5 DMAs used in the core study (Seattle, Dallas, Chicago, Atlanta, and Philadelphia), particularly because these five markets were chosen to be a geographically dispersed subset of the Nielsen people meter universe.
- The analysis is focused on TV viewed in participants' own homes; the very small exposure that they have in other people's homes or that guests have in Nielsen homes is ignored.
- The final adjustment between the last two rows on the previous page would involve calculating a weighted combination of in-home TV means excluding and including zeros in order to bridge the gap between VCM's daily definition of users (94.1% incidence) and Nielsen's monthly definition of users (98.6% incidence).

Spring Vs. Fall 2008 Increase In Live TV Time: Nielsen and VCM

- **Implication:** Since VCM was roughly 3% lower than Nielsen for the Spring and grew roughly 1.5 percentage points more than Nielsen for Spring vs. Fall, VCM Fall to Nielsen comparison was within roughly 1.5%.

Nielsen LPM PUT 5 DMA Avg.	**Females 18-49**	**Females 50+**	**Males 18-49**	**Males 50+**	Weighted increase
May-April	18.02	26.03	16.19	22.3	
Sep-Oct	18.64	27.07	17.18	23.88	
% increase	3.44%	4.00%	6.11%	7.09%	**5.03%**
% Pop (ACS est.)	29.92%	21.56%	30.34%	18.18%	

VCM (average minutes including 0)	
	Live TV
Spring 2008	299.48
Fall 2008	318.74
% increase	**6.43%**

Commercial Minutes Calculated From 2008 Nielsen Data

- This was slightly lower than VCM estimates (by about 5 minutes per hour), which is reasonable, given that Nielsen does not count local advertising.

	April '08	May '08	Sep '08	Oct '08	4 Mth Avg
Duration	40,320	40,320	40,320	40,320	40,320
AA%	20.25	19.75	20.69	20.76	20.36
AA Proj (000)	44,813	43,699	46,440	46,597	45,387
Daily Hrs Viewed	**4.86**	**4.74**	**4.97**	**4.98**	**4.89**
Comml % of TV Hrs	20.3%	20.3%	20.2%	20.2%	20.3%
Comml Rtg Index	94.91	94.91	94.47	94.47	94.69
Comml % of Viewing	19.3%	19.3%	19.1%	19.1%	19.2%
Daily Comml Hrs Viewed	**0.94**	**0.91**	**0.95**	**0.95**	**0.94**

Source: Nielsen N-Power, Apr. '08, May '08, Sep. '08, Oct.'08 tv months, A18+, M-Su 6p-6am, time period data. Commercial viewing data based on Nielsen N-Power, week starting 4/28/08 for Apr. '08 & May '08 estimates & 9/29/08 for Sep. '08 and Oct. '08 estimates, program data, all viewing sources.

Note: TV viewing not covered in Nielsen program data assumed equal to "All Other Tuning: Uncoded" share of time-period HUT.

But What About By Age?
Nielsen 3 Screen Report Calculations By Age

Q3 2008 monthly time among users						
	18-24	25-34	34-44	45-54	55-64	65+
Watching TV in the Home	108:36	133:00	134:51	159:23	175:18	196:23
Watching Video on the Internet	3:57	3:21	2:44	2:17	1:37	1:07
Watching Video on a Mobile Phone	3:15	4:20	3:37	2:10	2:53	n/a
Translated into minutes						
Watching TV in the Home	6,516	7,980	8,091	9,563	10,518	11,783
Watching Video on the Internet	237	201	164	137	97	67
Watching Video on a Mobile Phone	195	260	217	130	173	-
Adjusted for overall monthly reach and video indices comparison by age						
Watching TV in the Home	6,516	7,980	8,091	9,563	10,518	11,783
Watching Video on the Internet	115	99	95	68	47	12
Watching Video on a Mobile Phone	14	22	11	3	3	-
Total	6,645	8,100	8,196	9,634	10,568	11,795
%						
Watching TV in the Home	98.1%	98.5%	98.7%	99.3%	99.5%	99.9%
Watching Video on the Internet	1.7%	1.2%	1.2%	0.7%	0.4%	0.1%
Watching Video on a Mobile Phone	0.2%	0.3%	0.1%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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24. Miscellaneous

VCM Sample Disposition

FULL CORE SAMPLE: NIELSEN SAMPLE PLUS W18-34 SUPPLEMENT												
	Completed Static Sample Observations by Age and Gender											
	Total				Male				Female			
Age	Count	% Total	% Pop	INDEX	Count	% Total	% Pop	INDEX	Count	% Total	% Pop	INDEX
18 - 34	103	28%	31%	**90**	50	13%	16%	**86**	53	14%	15%	**94**
35 - 54	152	41%	39%	**106**	77	21%	19%	**108**	75	20%	19%	**104**
55+	117	31%	31%	**103**	49	13%	14%	**96**	68	18%	17%	**108**
Total	372	100%	100%	**100**	176	47%	49%	**98**	196	53%	51%	**102**

Note: Age identification missing for 4 participants
Demo data for one of the supplementary W18-34 unverified

NIELSEN SAMPLE ONLY												
	Completed Static Sample Observations by Age and Gender											
	Total				Male				Female			
Age	Count	% Total	% Pop	INDEX	Count	% Total	% Pop	INDEX	Count	% Total	% Pop	INDEX
18 - 34	80	23%	31%	**74**	50	14%	16%	**91**	30	9%	15%	**57**
35 - 54	152	44%	39%	**113**	77	22%	19%	**116**	75	21%	19%	**110**
55+	117	34%	31%	**110**	49	14%	14%	**102**	68	19%	17%	**115**
Total	349	100%	100%	**100**	176	50%	49%	**104**	173	50%	51%	**96**

Note: Age identification missing for 3 participants

Response Rate

Counts	VIDEO CONSUMER MAPPING STUDY RESPONSE RATE ANALYSIS - Nielsen Sample Only	% Starting Sample	% Correct Numbers Attempted	AAPOR	% Correct Contacts	% Correct Demo Contacts	% Qualified Contacts	% Willing	% Obsd Round One
	TELEPHONE RECRUITMENT								
4265	Total starting sample	100.0%							
20	Not Called	0.5%							
1273	Bad Numbers	29.8%							
28	DQ: Geography	0.7%							
2944	Total Correct Numbers Attempted		100.0%						
2154	Total CNA - DQ Demo					100.0%			
734	No answer	17.2%	24.9%			34.1%			
2210	Total Correct Contacts				100.0%				
790	DQ: Demo	18.5%	26.8%		35.7%				
2685	Estimated Total Qualified			100.0%					
1420	Total Qualified Contacts						100.0%		
896	Refusal	21.0%	30.4%	33.4%	40.5%	41.6%	63.1%		
524	**Willing provided to BSU**	**12.3%**	**17.8%**	**19.5%**	**23.7%**	**24.3%**	**36.9%**	**100.0%**	
	ROUND ONE OBSERVATIONS								
69	Refusals to BSU	1.6%	2.3%	2.6%	3.1%	3.2%	4.9%	13.2%	
82	Not Called by BSU (DQ demo)	1.9%	2.8%	3.1%	3.7%	3.8%	5.8%	15.6%	
4	Not Called by BSU (DQ bad #s)	0.1%	0.1%	0.1%	0.2%	0.2%	0.3%	0.8%	
4	Disqualified during observation (DQ drug use, unsafe environment)	0.1%	0.1%	0.1%	0.2%	0.2%	0.3%	0.8%	
365	**Observed**	**8.6%**	**12.8%**	**14.1%**	**17.2%**	**17.7%**	**27.4%**	**84.1%**	**100.0%**
	ROUND TWO OBSERVATIONS, FINAL RESPONSE RATES								
4	Refusals to BSU	0.1%	0.1%	0.1%	0.2%	0.2%	0.3%	0.8%	1.1%
2	Not Called by BSU (DQ moved)	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.4%	0.5%
4	Not Called by BSU (DQ bad #s)	0.1%	0.1%	0.1%	0.2%	0.2%	0.3%	0.8%	1.1%
3	Disqualified during/post observation (DQ drug use, unsafe environment, corrupted data files)	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.6%	0.8%
352	**Observed**	**8.3%**	**12.2%**	**13.6%**	**16.6%**	**17.0%**	**26.4%**	**80.9%**	**96.2%**
24	**Additional non-random W18-34 Supplement**								
376	**Total Core Sample**								

LEGEND

A: raw sample counts by disposition
C: % sample counts by disposition
D: response rate among qualified, correct #s E:AAPOR response rate
F: response rate, discounting no answer G: response rate discounting wrong demo H: response rate discounting both

I: % of willing by disposition at first observation
Final Round One response rate in each column discounts DQs in lines 19-21.

J: % of Round One observed by disposition at Round Two observation
Final Round Two response rate in each column discounts DQs in lines 25-27

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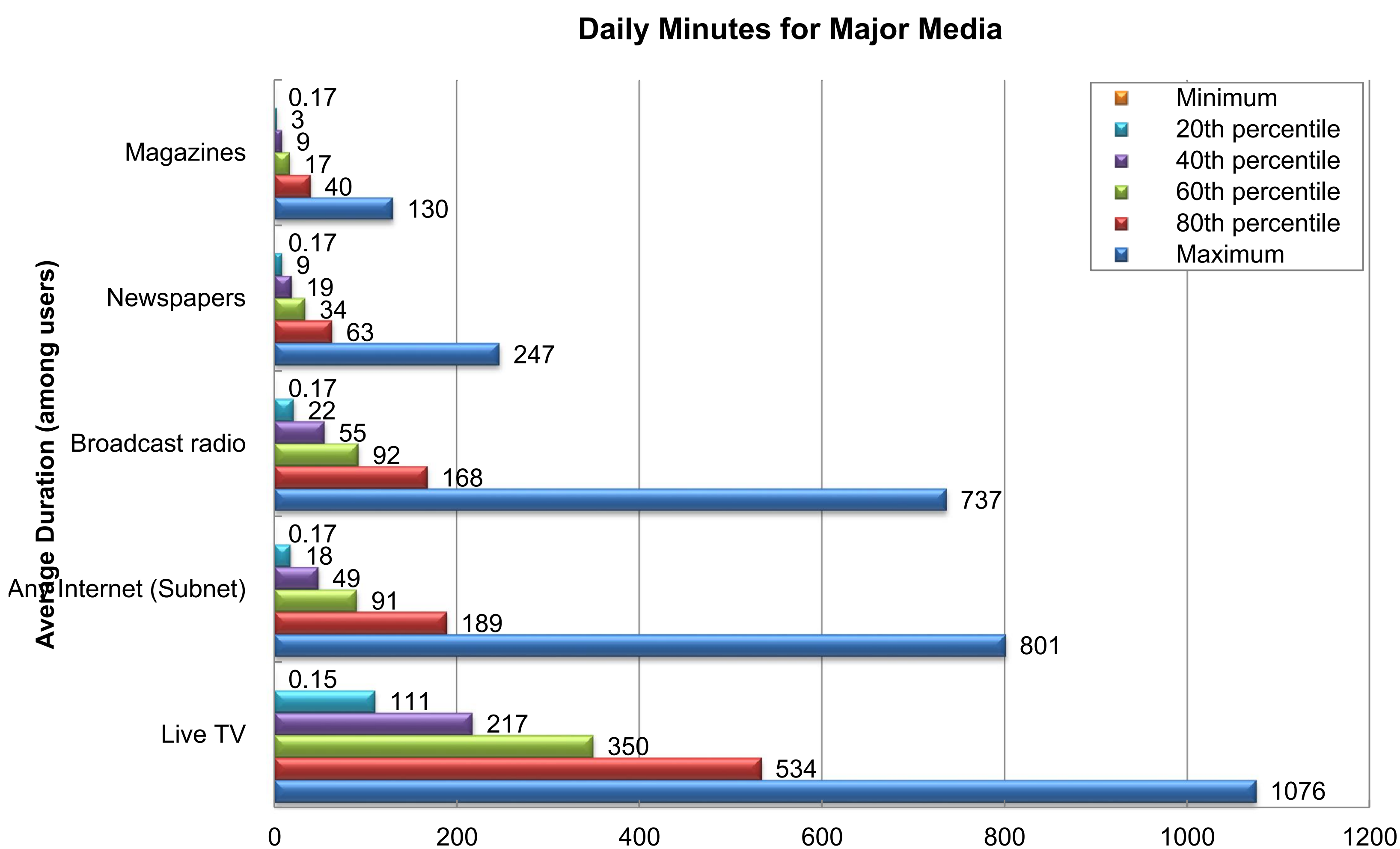
Quintile Summary For Major Media



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It Appears That The Broadband Transition Was Largely Behind Us For This Urban Population

Fall 2008	Core	Accelerated
Broadband	76%	97%
Dial up	5	-
No Connection	16	2
Missing	2	1

Those with broadband access (Core, Fall 2008)	vs. Those with no connection
Higher mobile phone reach	77% vs. 46%
Higher DVR reach	21% vs. 5%
Lower total media duration	602 vs. 700mins
Lower total TV minutes	338 vs. 550mins
Lower newspaper minutes	31 vs. 56mins
And of course are higher on any major computer-related measure	