

Mapping the Modern Media Ecosystem

A People-Centric View of Media Use

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The State of News?

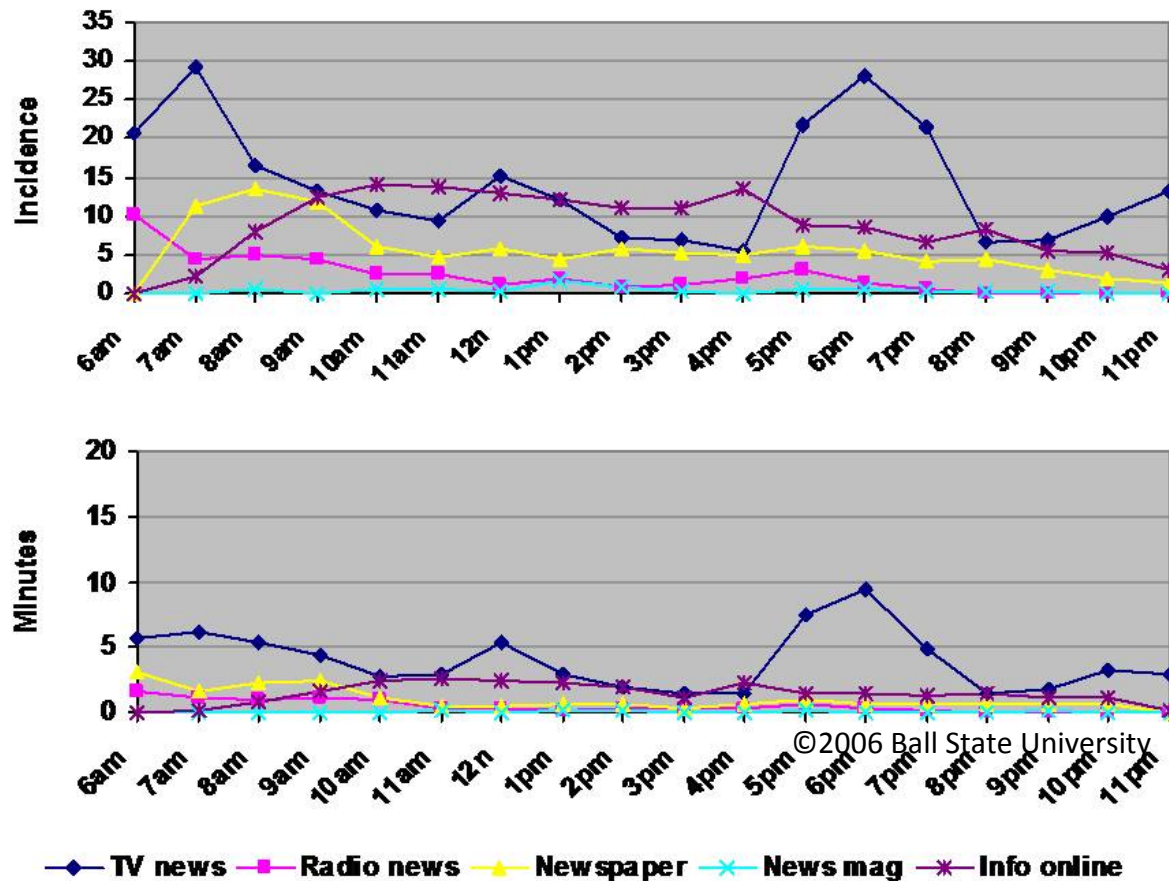
- *“Nobody reads news papers anymore”*
 - *“It’s all about online”*
 - *“Mobile is where it’s heading”*
 - *“Young people don’t care about news”*
-
- No such thing as silo-ed consumers
 - Relevance of content over channels?
 - Relevance of news to advertisers?
 - Relevance of advertisers to news?



Mapping News Consumption by Hours of the Day

News sources by hour of the day

MMSII 2005



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The VCM Study helps us understand media consumption in context



The Nielsen Company



Council for Research Excellence



**Media Consumption and Engagement
Committee of the CRE**

The CRE asked for a snapshot of the media world

Dimension current consumption of media—focusing on television and video—and how it is changing over time

in order to

Guide video media audience measurement...

... by generating a comprehensive map of the current media ecosystem

The study is complex and costly

Who?

- Primarily former Nielsen panelists (e.g. from FTO), recruited with Nielsen's assistance

What?

- Full waking day observation of media exposure, life activities and location

When?

- Observed twice, in Spring and Fall 2008

Where?

- Six regionally dispersed DMAs

How?

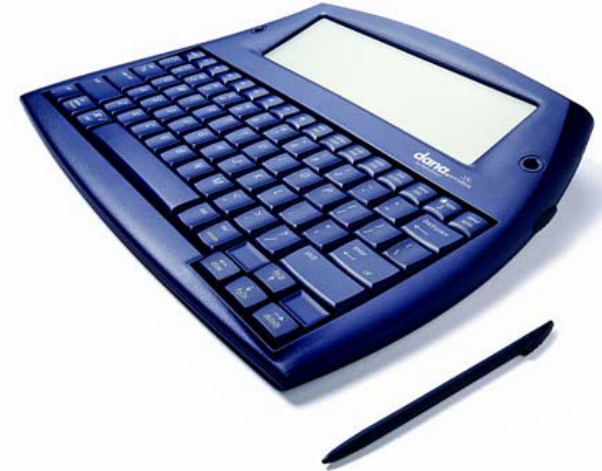
- Computer-assisted observation

How many?

- A final sample of 952 observed days: Over 15,000 hours of observation, at 10-second resolution

Observation

- “Shadowing” Approach
 - Trained observers shadow participants throughout their waking day
 - Average 14 to 15 hours of data per participant
- Cross-location and cross-media
- Computer-assisted observation
 - Dana™ “smart keyboard” from Alphasmart
 - Combines keyboard and touch screen
 - Observer records locations, life activity and media use
 - Current state is logged every 10 seconds
 - Produces a fine-grained, complex record of the participants’ day
 - Create “Day in the Life” Maps



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Media codes

TV

- News program
- Sports program
- Entertainment/info program
- Ad/Program promotion
- Surfing
- Navigation (e.g., program guide)

Video Playback

- Videotape
- DVD
- TiVo/DVR
- Other

Radio

Web

- Search (Yahoo, Google, Ask, etc.)
- Social network (MySpace, etc.)
- Online gaming
- Media browsing (YouTube, iTunes)
- Other

Email

Instant Msg

Software

- Office/writing/work
- Offline PC Game
- Online PC Game (non-web)
- Media (photo/imaging/video/sound)
- Other (Programming, CAD)

Computer Media

- CD on Computer (includes SACD)
- DVD on Computer (inc. music DVD)
- Digital Music Stored (on hard drive)
- Digital Music Streaming (real-time)
- Digital Video Stored
- Digital Video Streaming
- Other

Phone

- Landline
- Mobile Talk
- Mobile Texting/SMS
- Mobile Camera
- Mobile Video
- Mobile Audio (MP3)
- Mobile Games (any built-in game)
- Mobile Web (includes online game)
- Other

Portable Video

- Portable DVD
- Non-DVD (iPod, PSP, PDA, etc.)
- Other

Music

- Portable Music (iPod, other MP3)
- Home/Office Stereo or boom box
- Other (e.g., music in retail setting)

Print

- Newspaper
- Magazine
- Book
- Other

Games

- Console Online
- Console Offline
- Portable (PSP, Gameboy, etc)
- Other (arcade, DVD extra, etc)

Digital Transfer

- Download audio
- Download video
- Upload audio
- Upload video

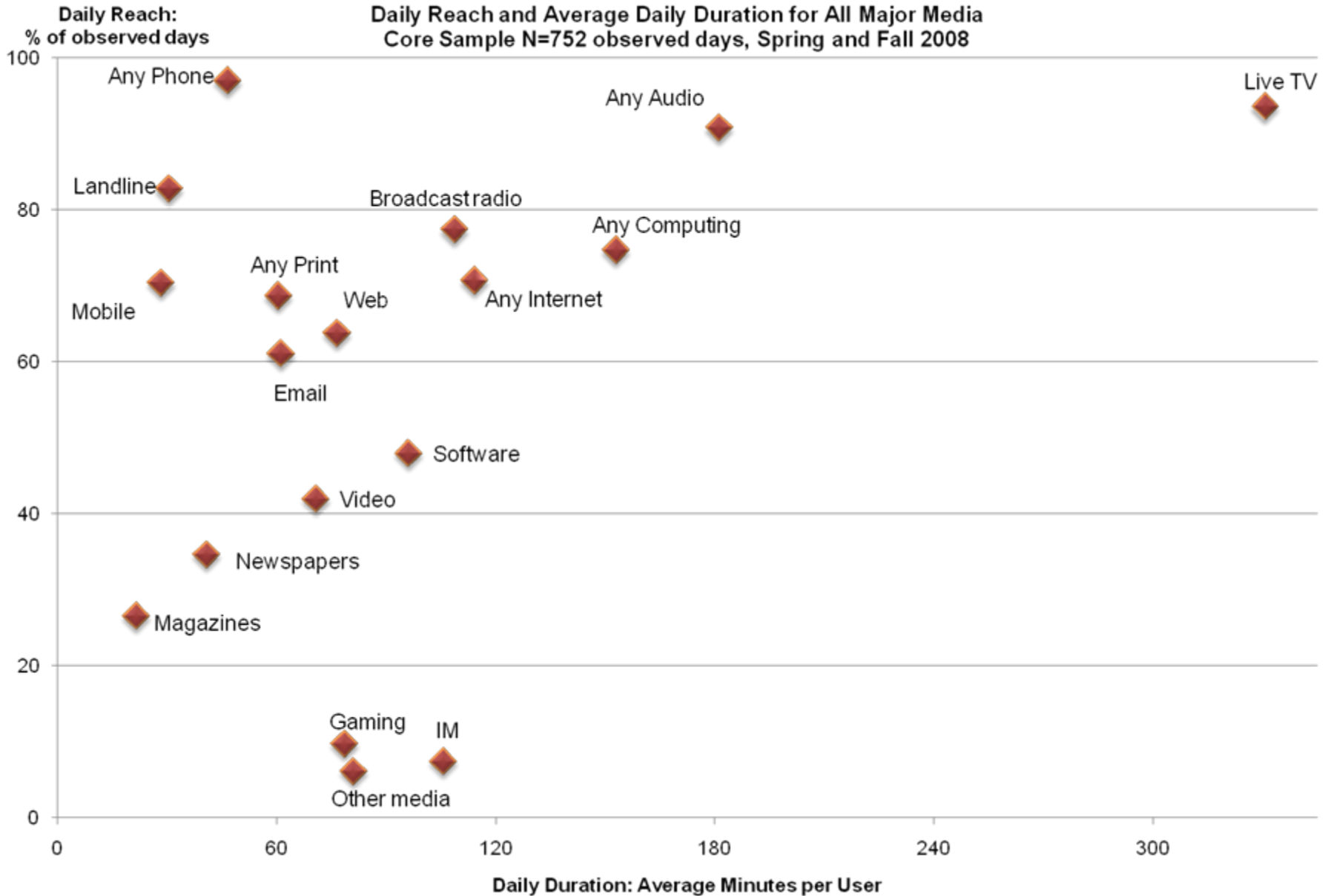
Other

- Cinema
- Other (walkie talkie or other 2-way radio, etc.)
- Apparent primary attention is noted in concurrent media exposures
- Supplemental flags are used to tag social/solitary viewing, altered speed, indoor/outdoor

The Media Ecosystem: Reach and Duration

VCM Study 2009

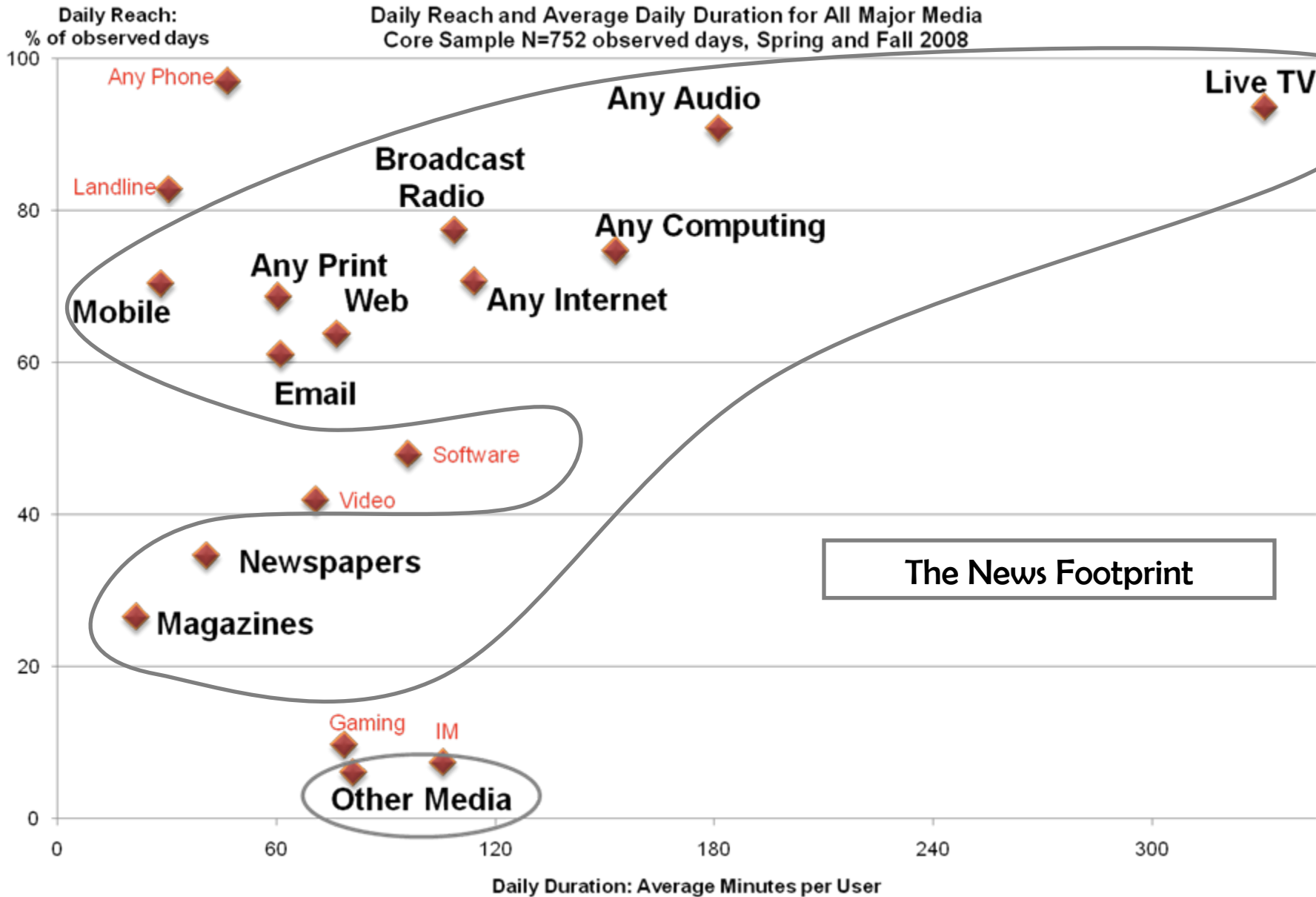
Daily Reach and Average Daily Duration for All Major Media
Core Sample N=752 observed days, Spring and Fall 2008



The Media Ecosystem: Reach and Duration

VCM Study 2009

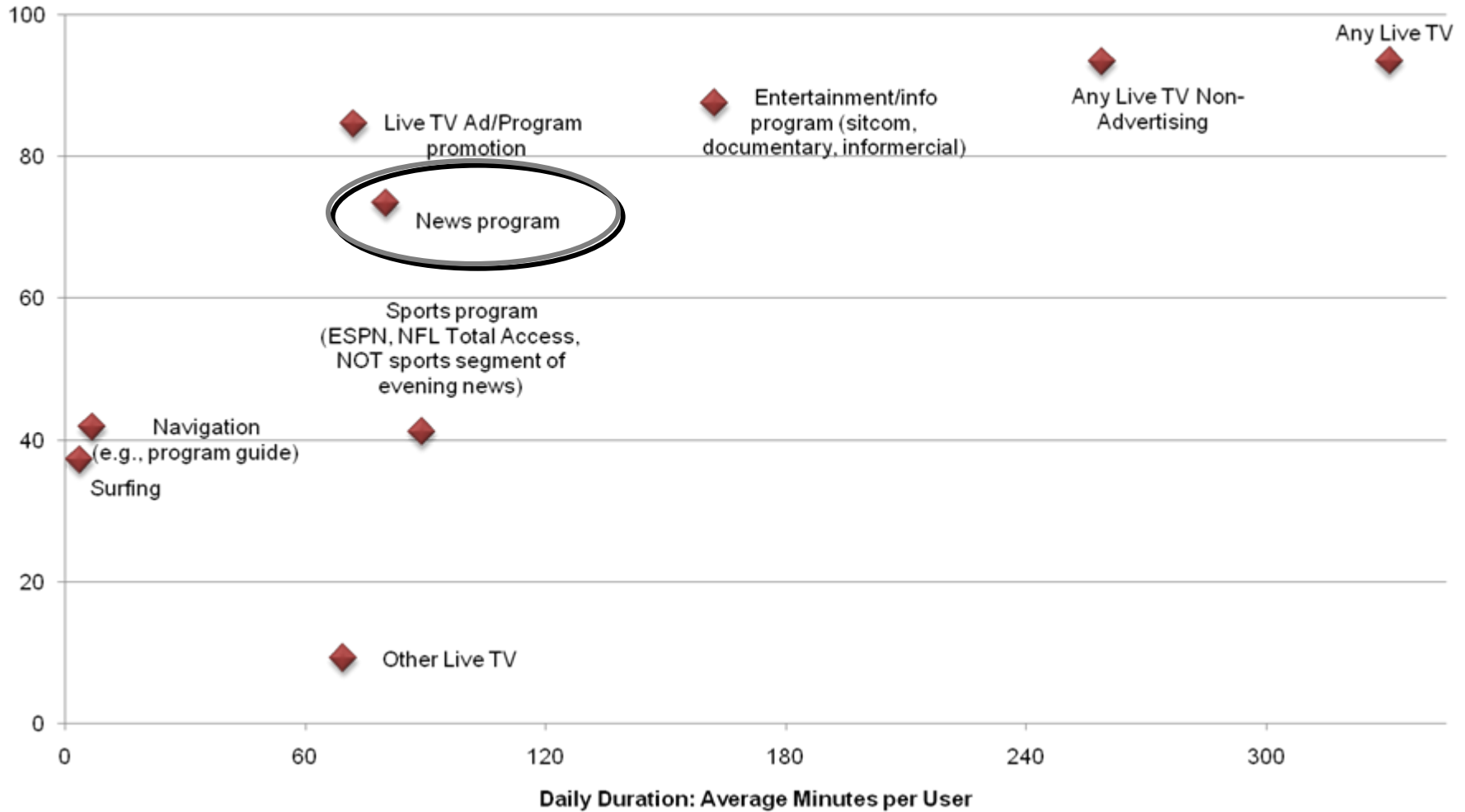
Daily Reach and Average Daily Duration for All Major Media
Core Sample N=752 observed days, Spring and Fall 2008



TV users were exposed to roughly an hour a day of live TV ads and promos

Daily Reach and Duration for Live TV Components
Core Sample N=752 observed days, Spring and Fall 2008

Daily Reach:
% of observed days



Thank You

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For More Data / Info

www.researchexcellence.com

