How People Use® Television

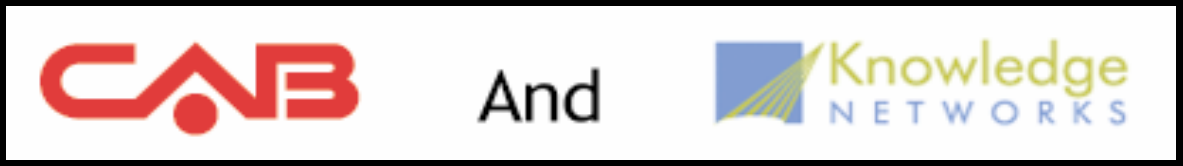


How People Use® Television

15 years (1990 – 2004)

27,000 interviews /

38,000 viewing segments

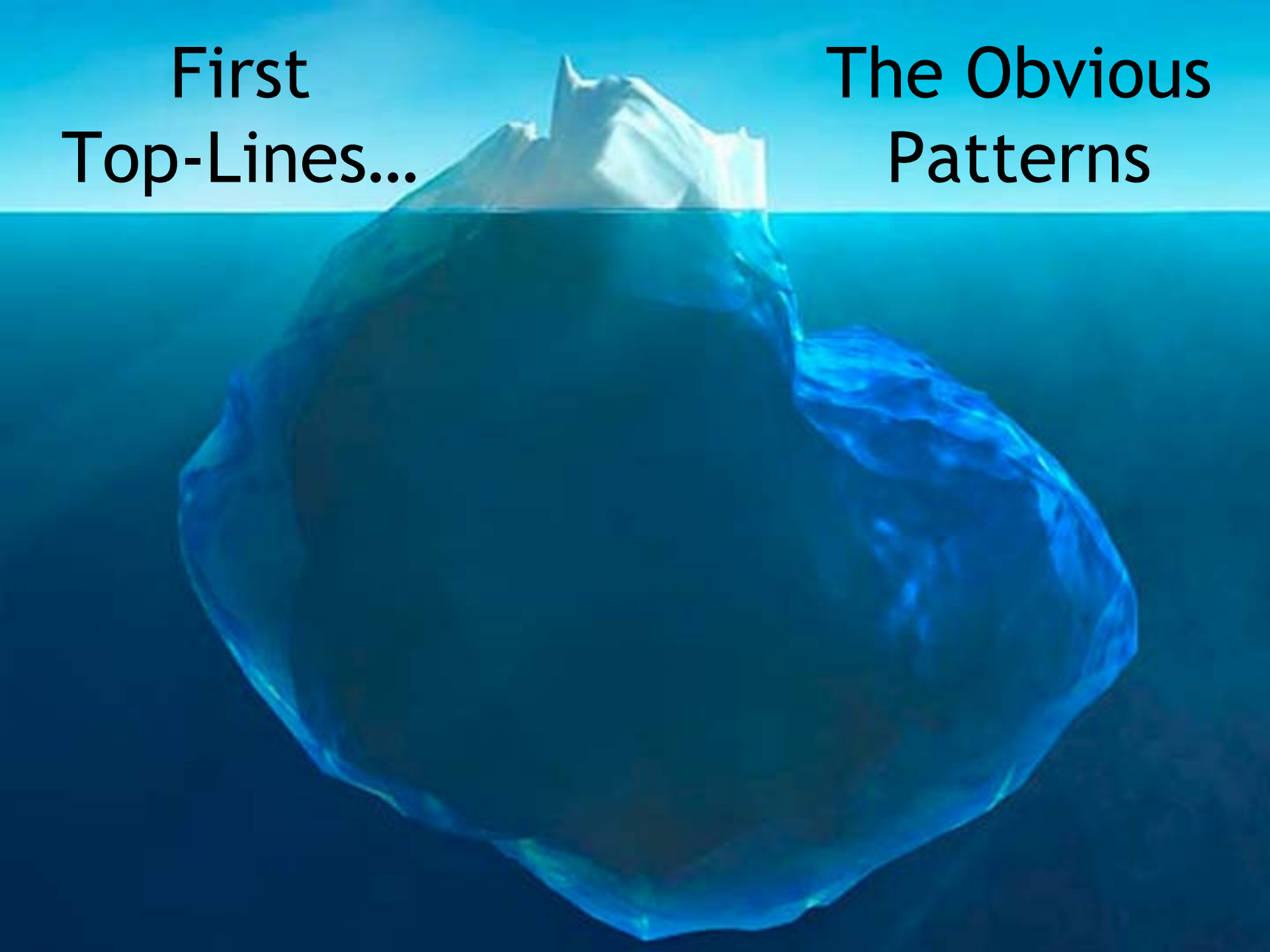


- Program Involvement
- Commercial Involvement
- Navigating/EPG?
- Plan/Appointment Dynamics
- Multi-Tasking
- PVR Role
- Digital Role

- "Wantedness" Learning
- Viewing Patterns
- Brands/Programs
- Attitudes to Ads
- Viewer Segments Emerge?
- DBS Differences
- Web Experience

Differences: Broadcast & Cable on Any Above?

Today?


First
Top-Lines…
The Obvious
Patterns

Navigation?

Half of all viewers start without a specific destination in mind…

And people go to Cable first as much as Broadcast first…

It’s One TV World.



33% used an Electronic Program Guide to learn what was on TV…

Another 23% just flipped channels.





Only 9% "just knew what was on."

Being Crystal Clear:

"How People Use TV"

In Field During February Sweeps

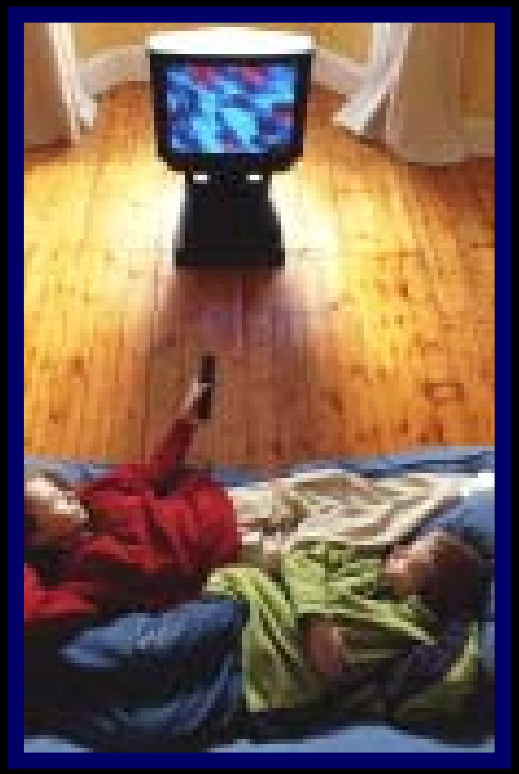
"Cable" = Ad-Supported Cable Only

Are You Really Watching?

Minutes of "eyes-on" the TV while watching the selected program last night?

31 minutes for Broadcast.

33 minutes for Cable.







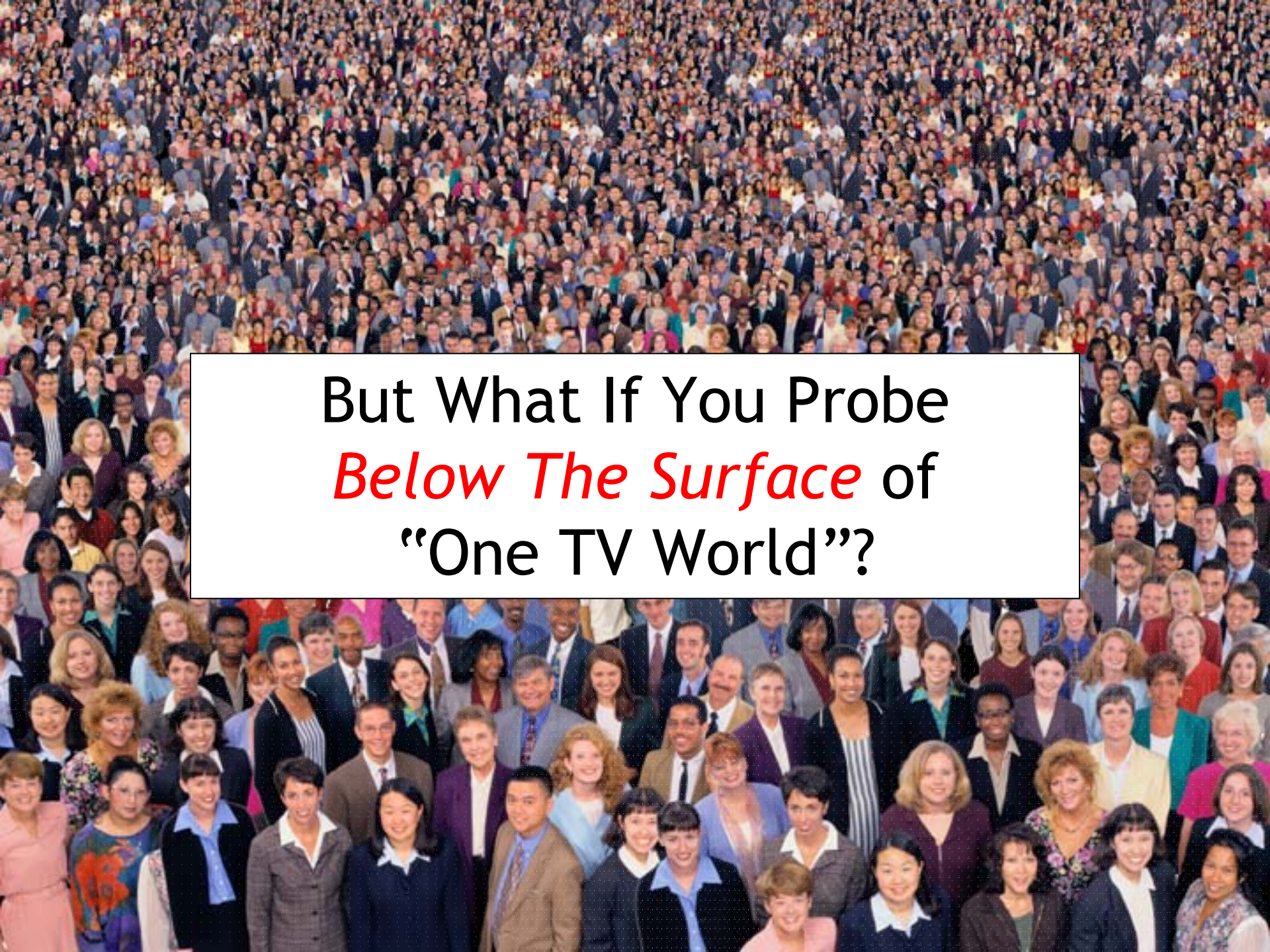
We spoke to 2000 people.

61%
Agree:

"I don't watch Broadcast TV or Cable TV…

I just watch TV"





But What If You Probe
Below The Surface of
"One TV World"?

Are You *Involved?*

Ten Questions…

Ten Questions…

Loyal?

Anticipated?

Best Shows?

Not Anywhere Else?

Personal?

You'd Miss Them?

Water Cooler?

Appointment TV?

Always Worth It?

Want More?

Are You *Loyal?*



11%

Consider themselves Equally “loyal” to Cable & Broadcast.

21%

Consider themselves “loyal” to Broadcast networks.



39%

Consider themselves "loyal" to Cable networks.



Anticipation…



11%

"Look forward to watching both Cable & Broadcast"

20%

“Look forward to watching Broadcast networks”





48%

"Look forward to watching Cable networks"





Best of Show?



11%

Think Cable & Broadcast networks "consistently show the best programs "

19%

Think "Broadcast networks consistently show the best programs"





57%

Think "Cable networks consistently show the best programs"

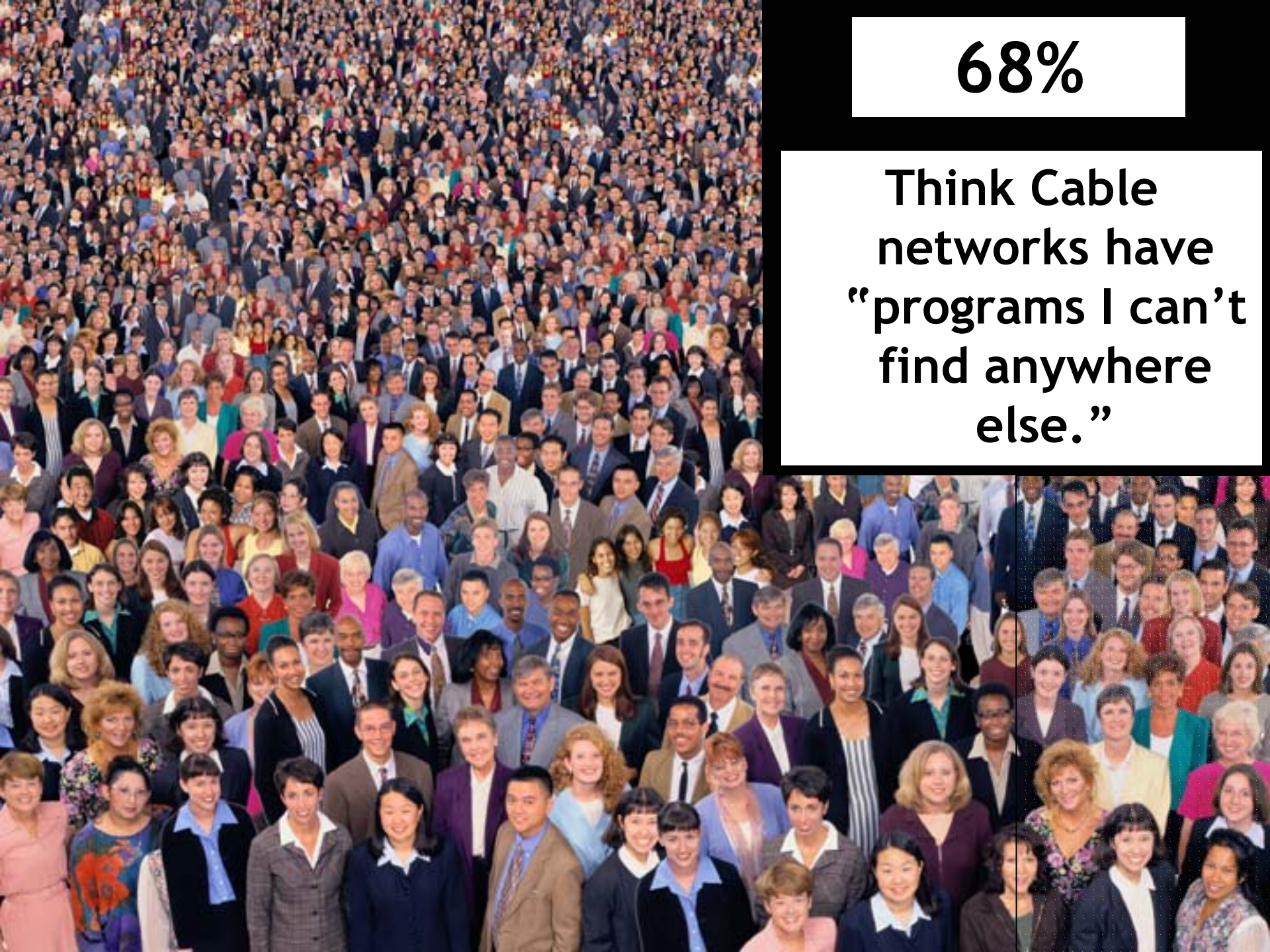
Are You *Sure?*

Programs I Can't Find Anywhere Else…

10%

Think Broadcast networks have “programs I can’t find anywhere else.”





68%

Think Cable networks have "programs I can't find anywhere else."

Is It Personal?

15%

Say "Broadcast networks complement my lifestyle."





46%

Say "Cable networks complement my lifestyle."



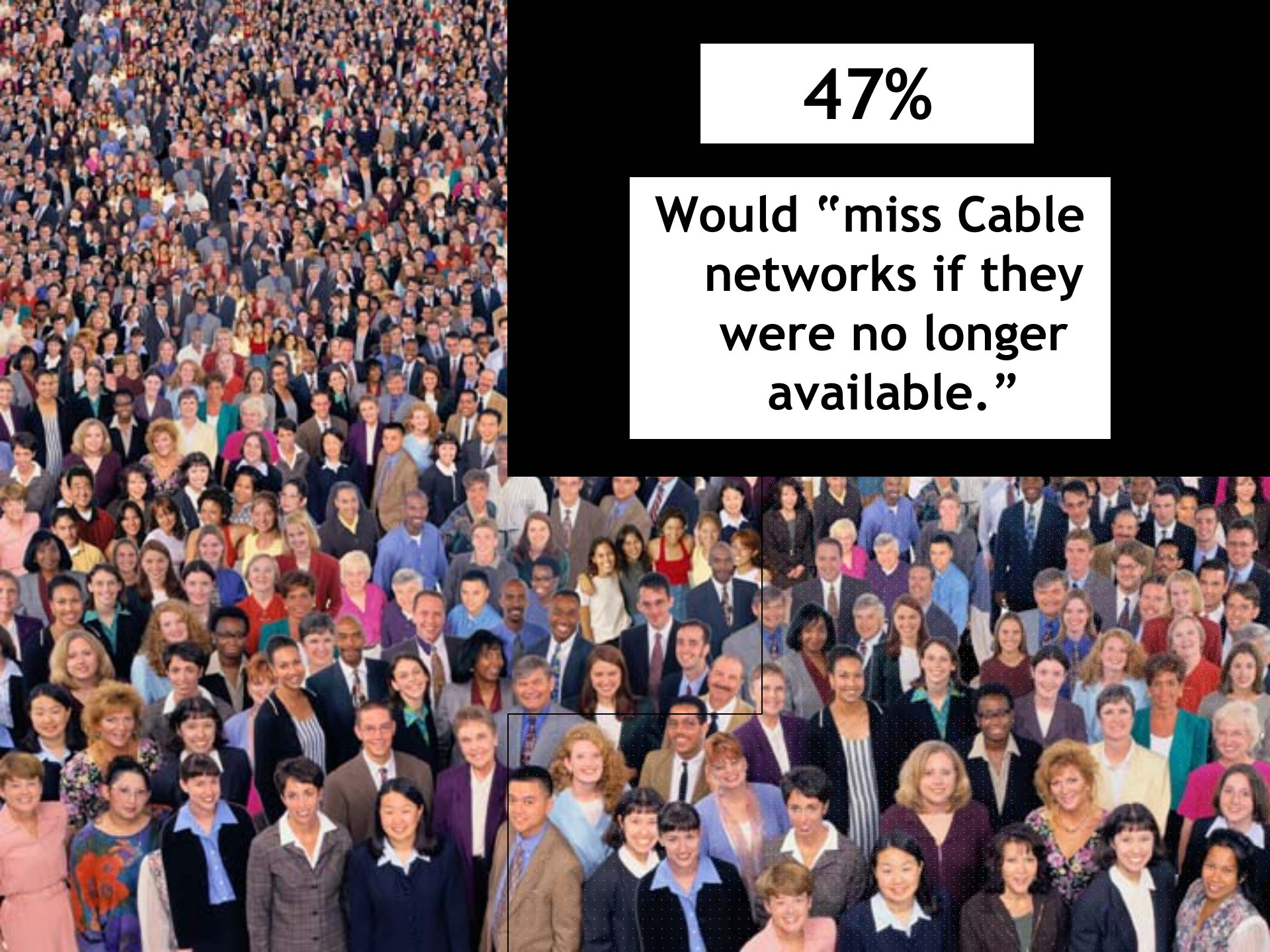
Is It Personal?

Would You Miss It?

23%

Would "miss Broadcast networks if they were no longer available."





47%

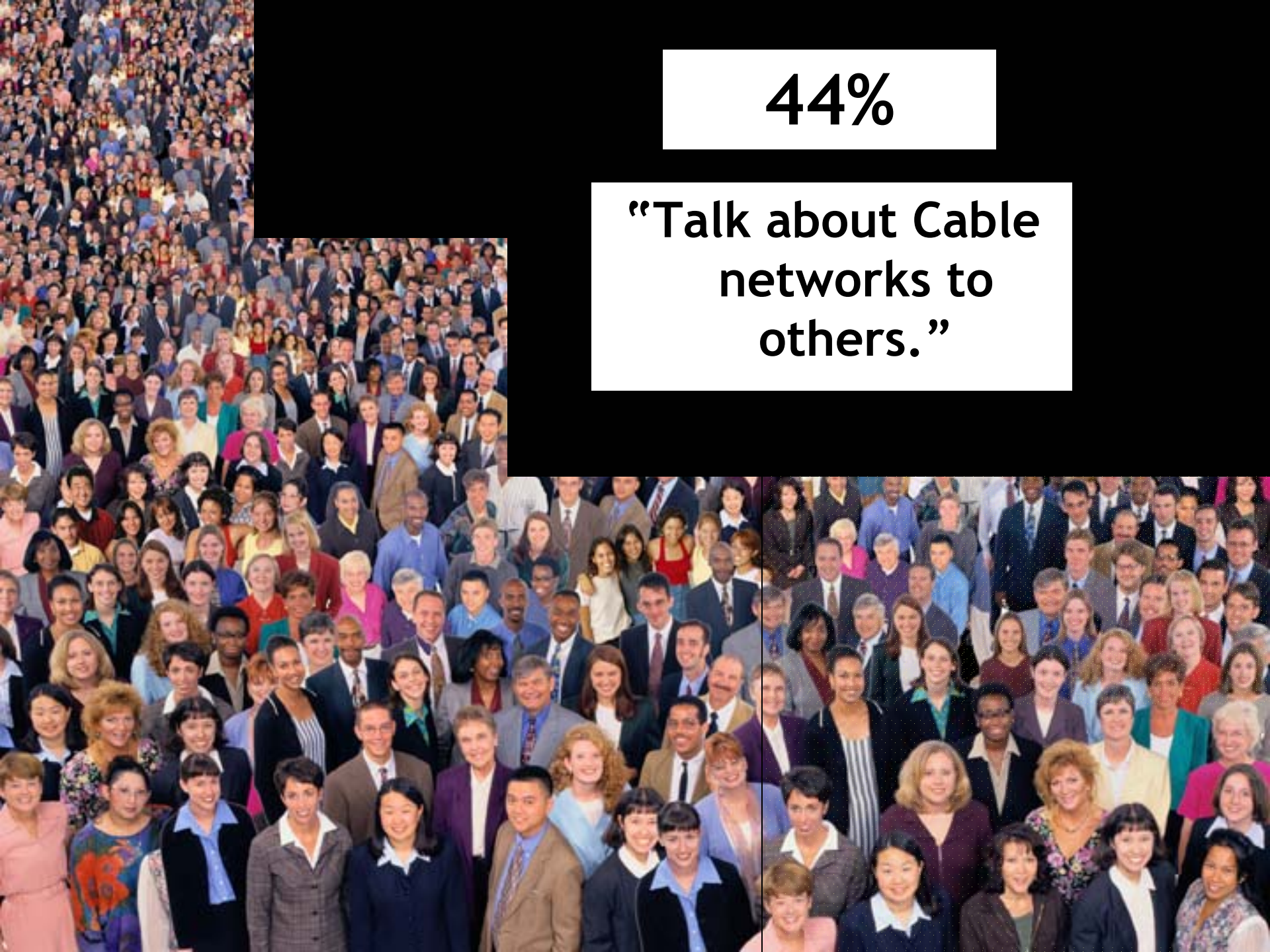
Would "miss Cable networks if they were no longer available."

Is It “Water Cooler”?

21%

"Talk about Broadcast networks to others."





44%

"Talk about Cable networks to others."

Is It “Appointment” TV?

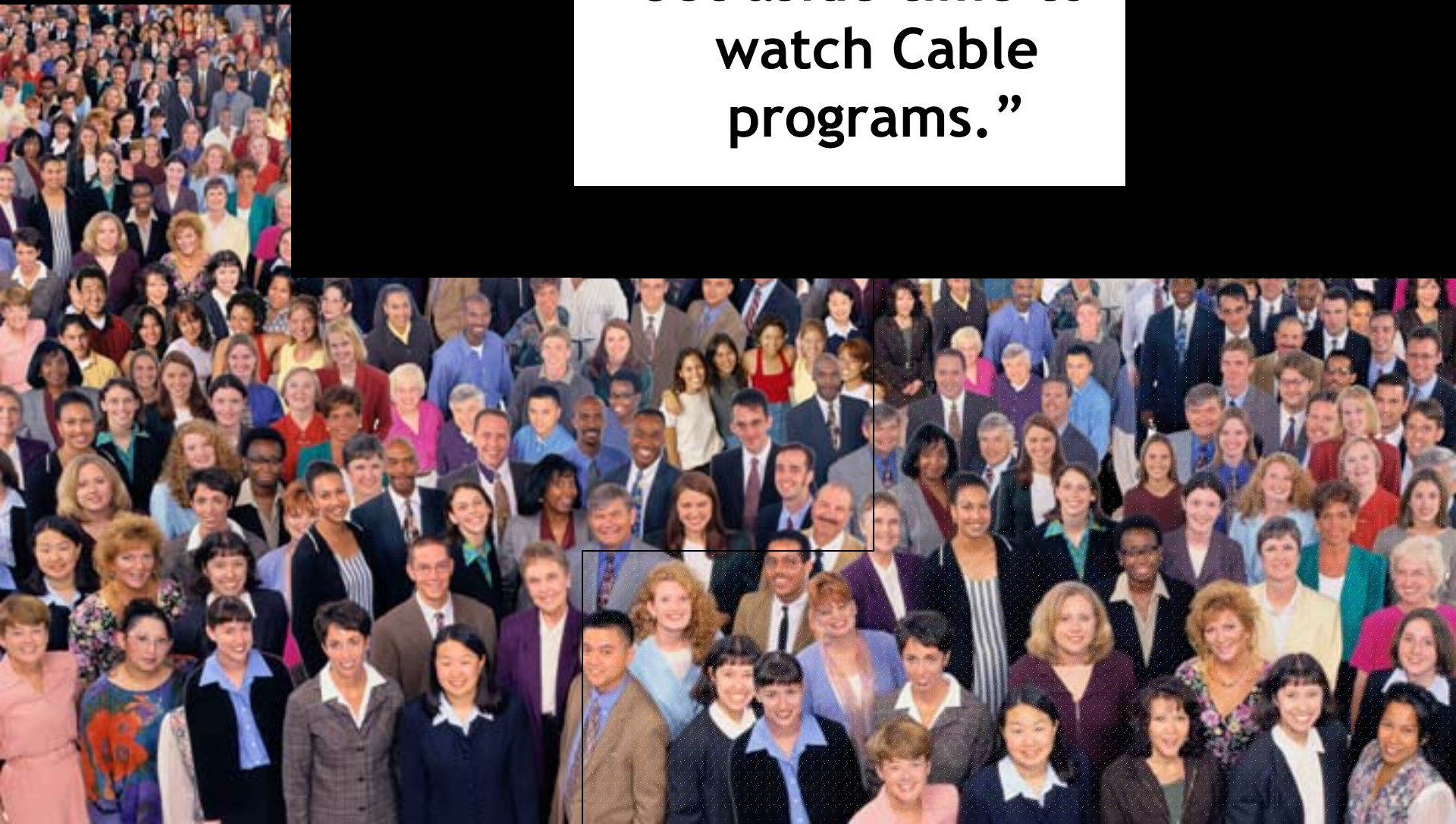
25%

"Set aside time to watch Broadcast programs."



34%

"Set aside time to watch Cable programs."



Is It Always Worth It?

17%

Think "It's always worth checking what's on Broadcast TV."





49%

Think "It's always worth checking what's on Cable TV."

Do You Want More?

20%

Say “recent new programs on Broadcast have made me want to watch more.”





42%

Say "recent new programs on Cable have made me want to watch more."





Ten Questions…

Loyal?

Anticipated?

Best Shows?

Not Anywhere Else?

Personal?

You'd Miss Them?

Water Cooler?

Appointment TV?

Always Worth It?

Want More?

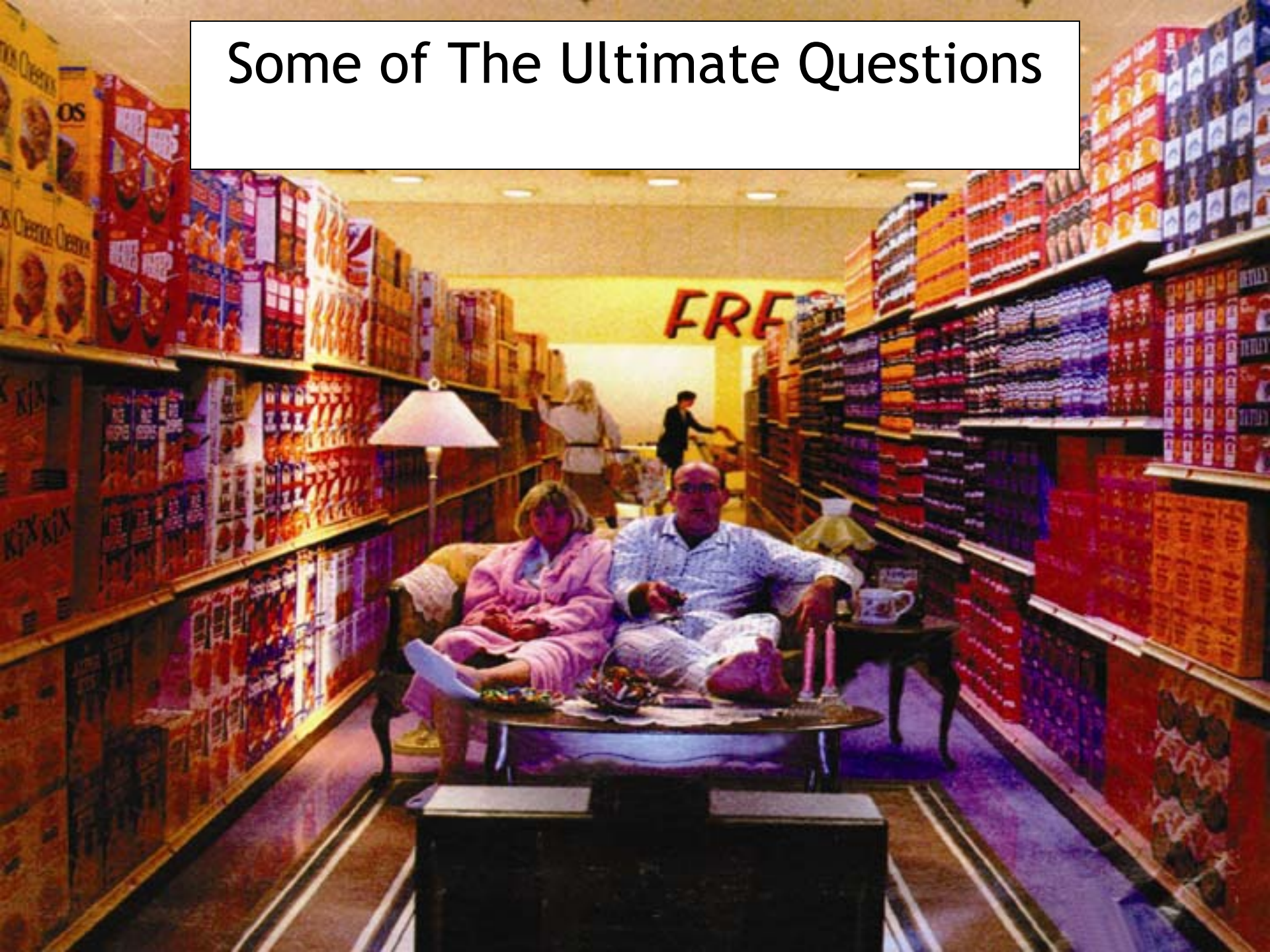


Ten Questions…

Loyal?	Cable
Anticipated?	Cable
Best Shows?	Cable
Not Anywhere Else?	Cable
Personal?	Cable
You'd Miss Them?	Cable
Water Cooler?	Cable
Appointment TV?	Cable
Always Worth It?	Cable
Want More?	Cable


Cheerios
KIX
FRE

Some of The Ultimate Questions




What About The Ads?
Do You Think They Work?

Can We Do A Little Business?

Six Questions…

Six Advertising Questions…

Attention?

Can We Talk?

Interested?

Might You Learn?

Our Advertisers?

Can We Close The Deal?

Attention, Attention?

31%

"I tend to pay attention to ads on Broadcast TV."




44%
"I tend to pay attention to ads on Cable TV."

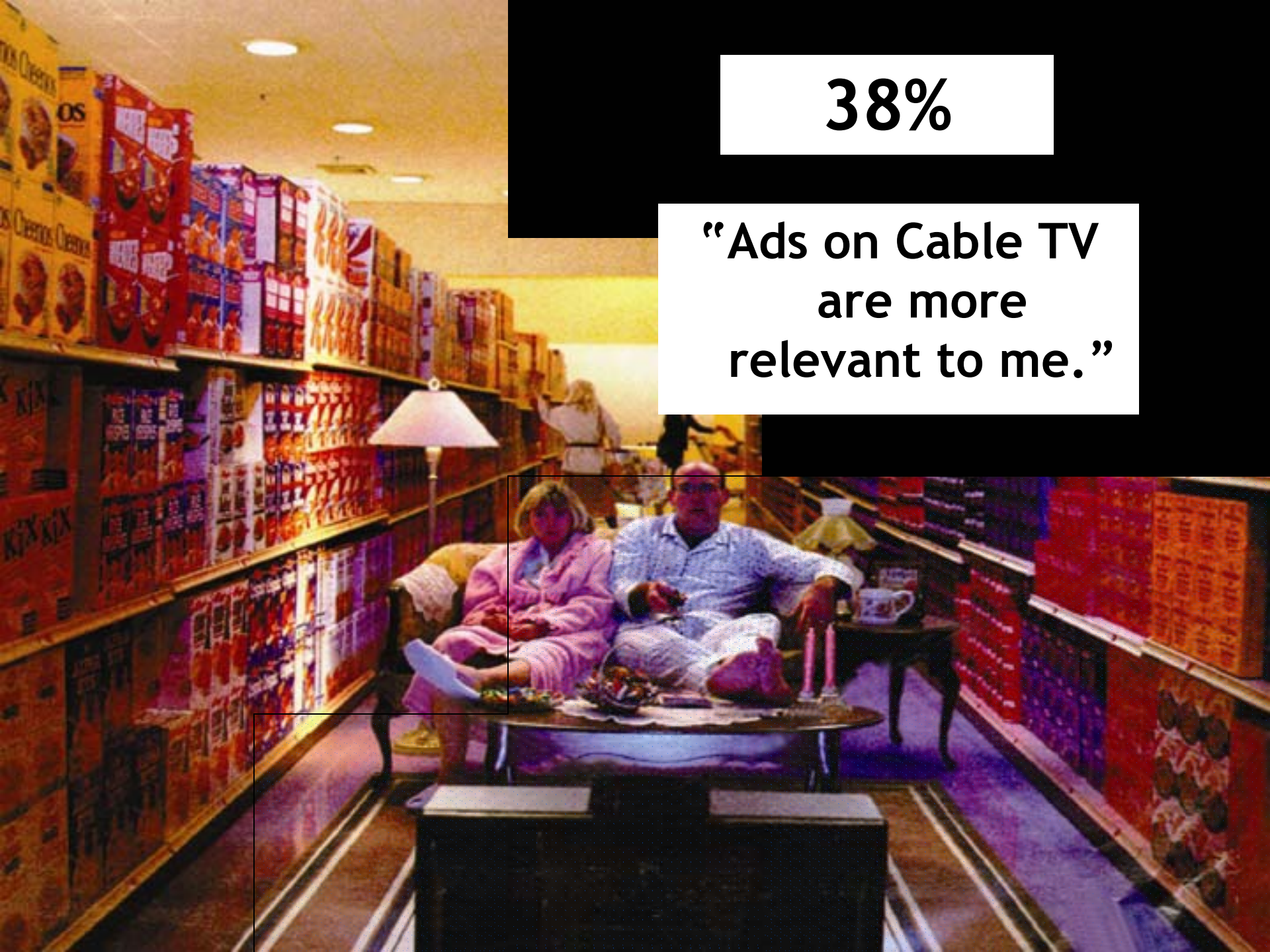

24%
"I tend to pay attention to ads on Cable & Broadcast TV."

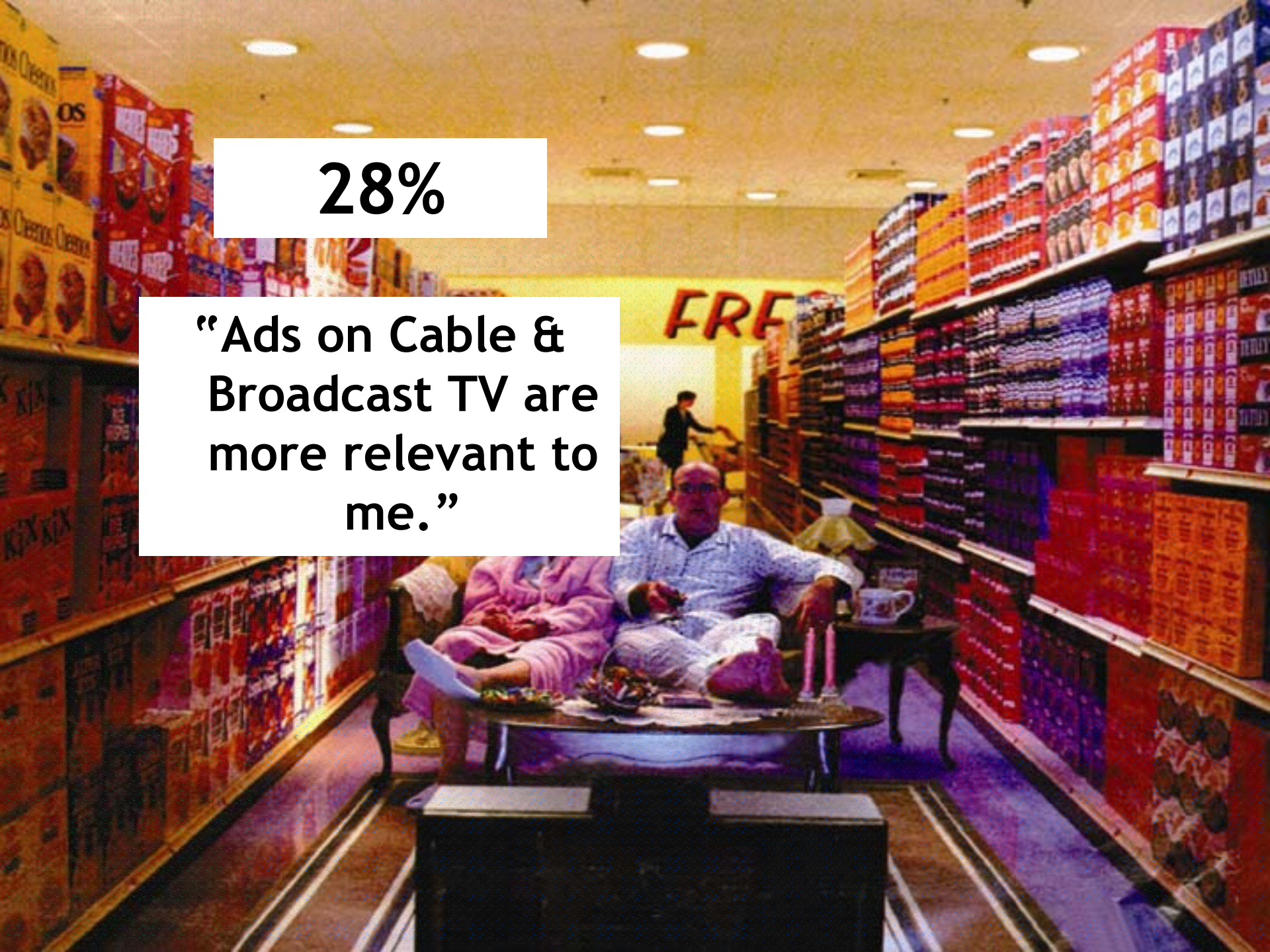
Can We Talk?

34%

"Ads on Broadcast TV are more relevant to me."




38%
"Ads on Cable TV are more relevant to me."


28%
"Ads on Cable & Broadcast TV are more relevant to me."

Are You Interested?

32%

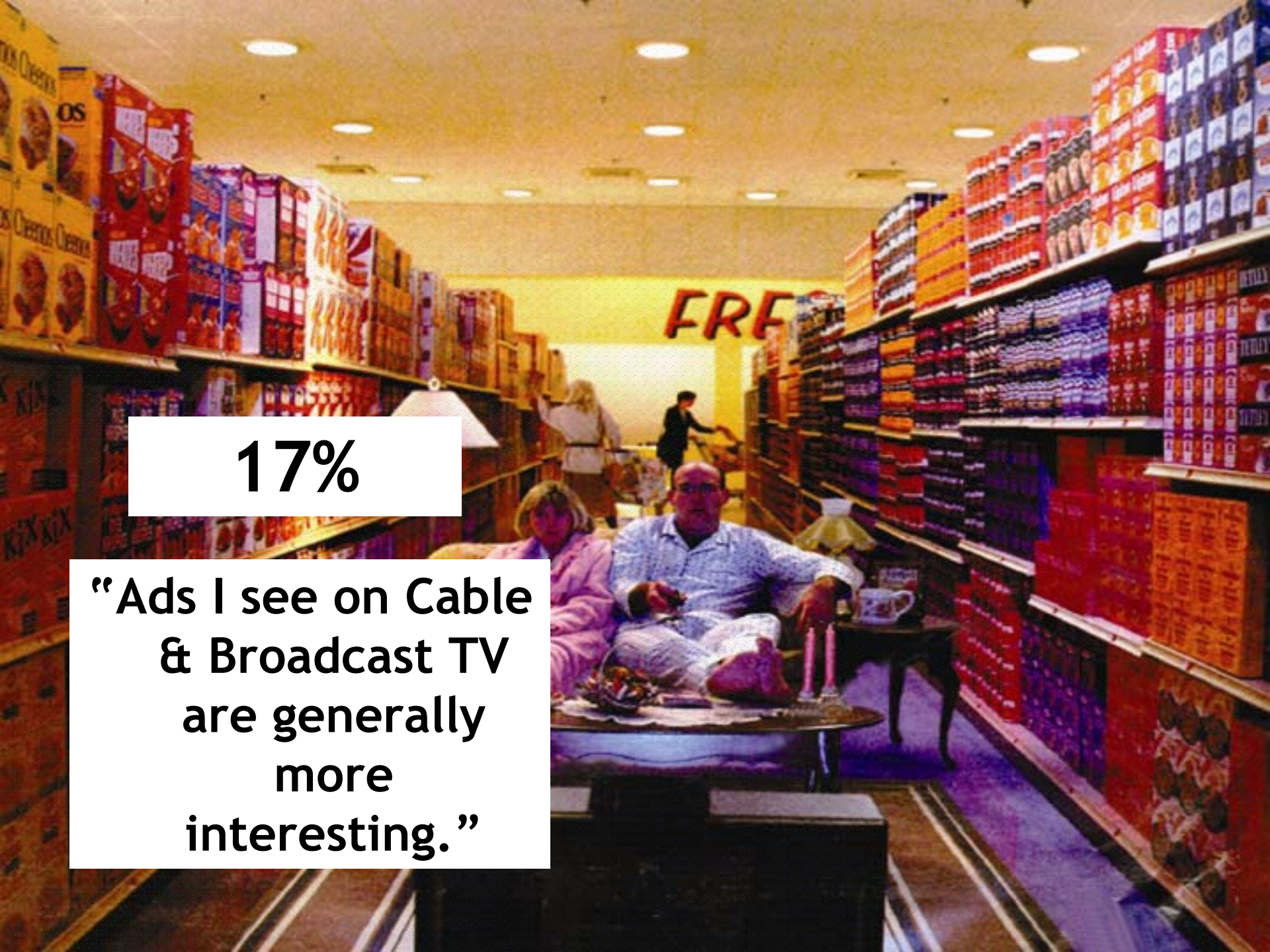
"Ads I see on Broadcast TV are generally more interesting."





51%

"Ads I see on Cable TV are generally more interesting."



17%

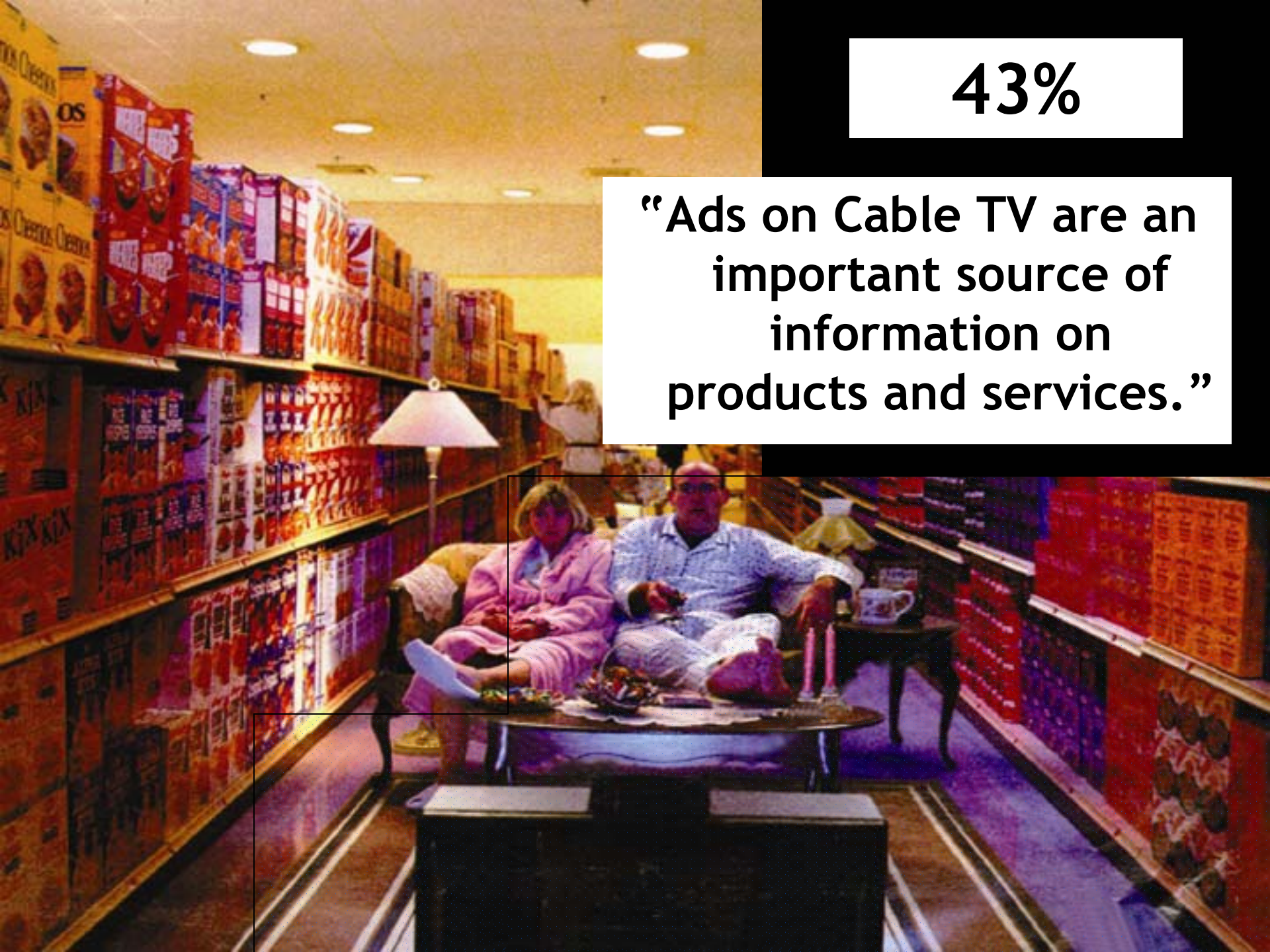
"Ads I see on Cable & Broadcast TV are generally more interesting."

Might You Learn Something?

35%

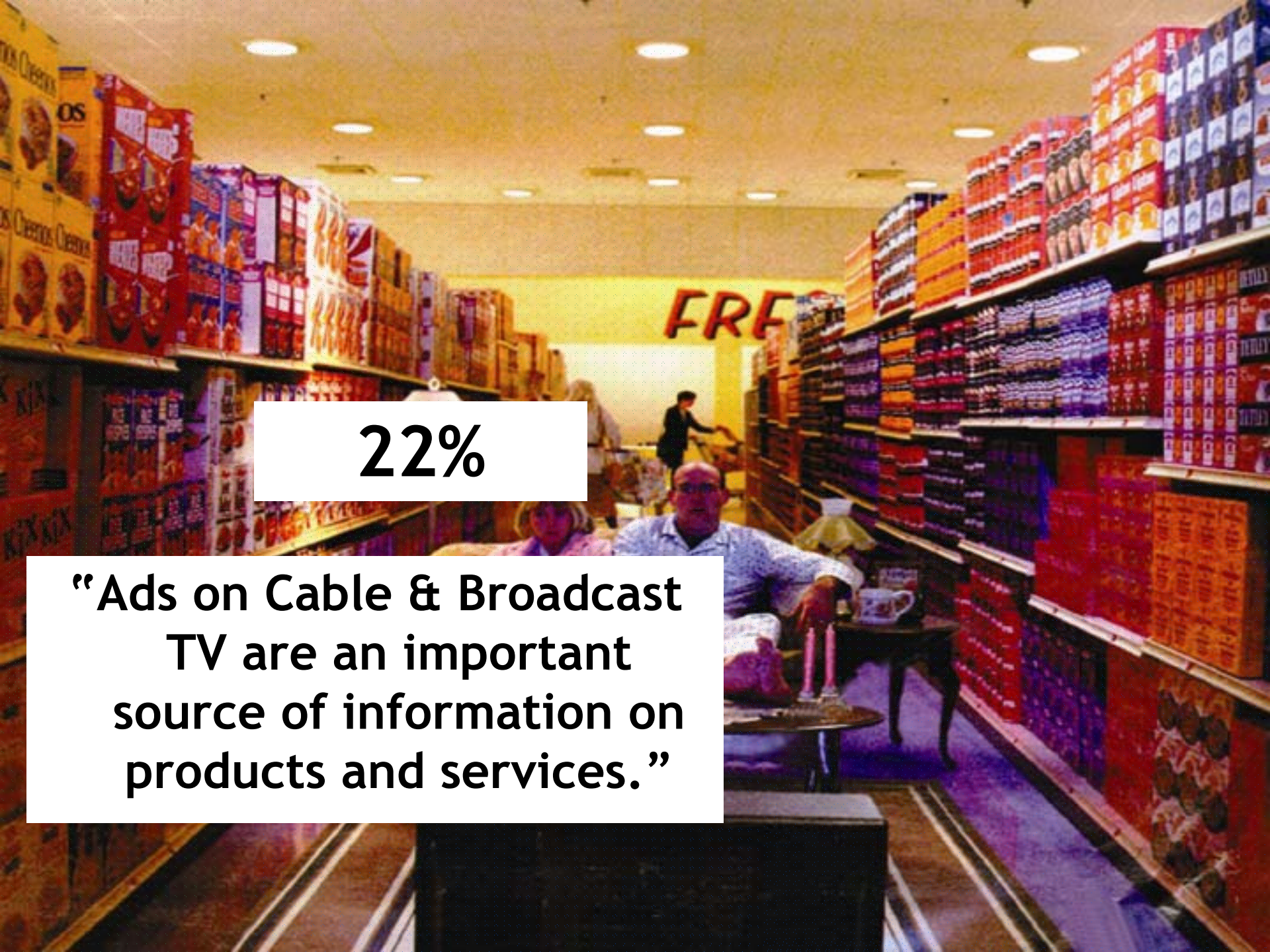
"Ads on Broadcast TV are an important source of information on products and services."





43%

"Ads on Cable TV are an important source of information on products and services."


22%
"Ads on Cable & Broadcast TV are an important source of information on products and services."

What Do Think of Our Advertisers?

33%

"Companies that advertise on Broadcast networks have a commitment to quality & excellence."





38%

"Companies that advertise on Cable networks have a commitment to quality & excellence."



29%

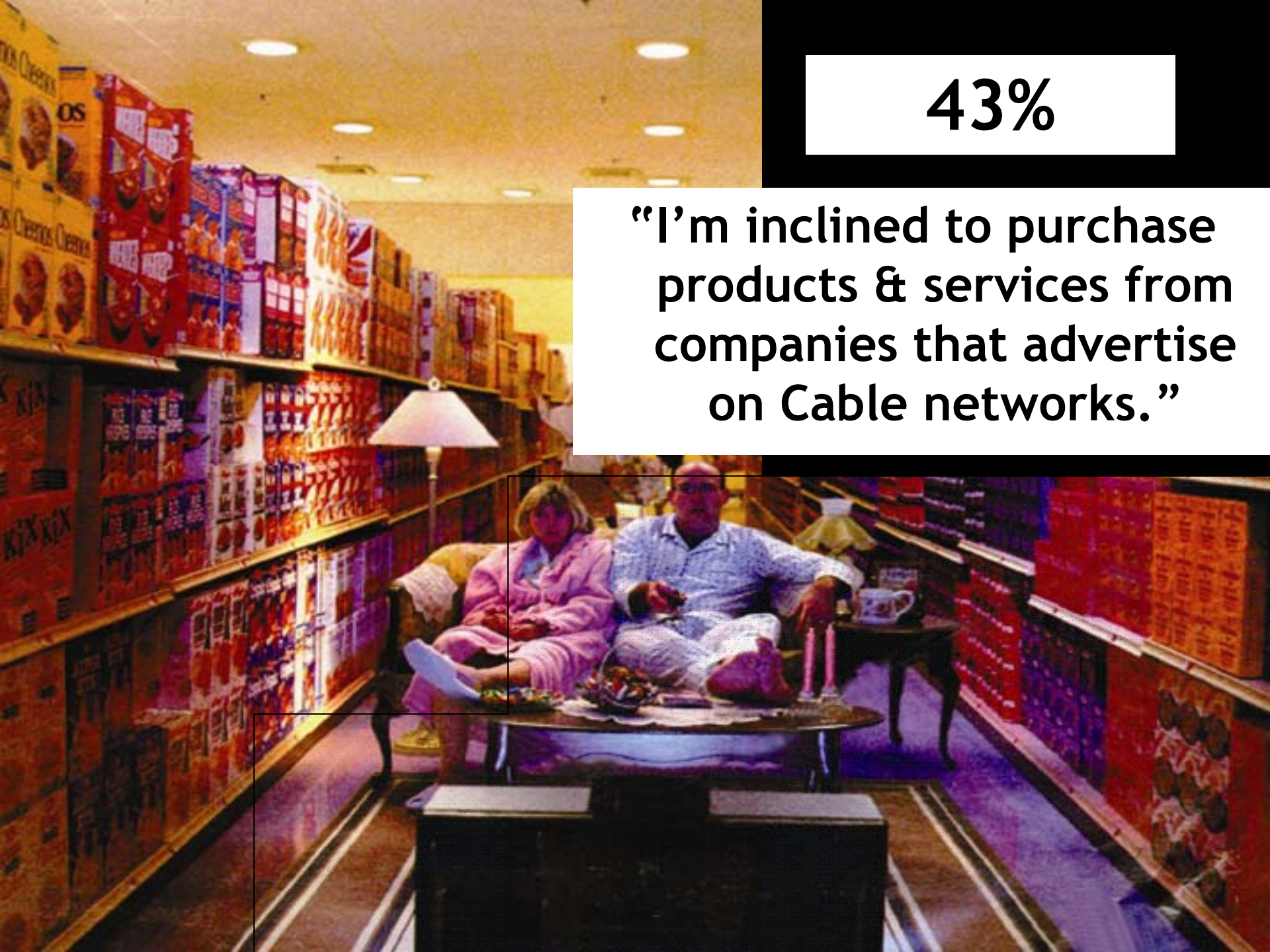
"Companies that advertise on Cable & Broadcast networks have a commitment to quality & excellence."

Will You Let Us Close The Deal?

36%

"I'm inclined to purchase products & services from companies that advertise on Broadcast networks."





43%

"I'm inclined to purchase products & services from companies that advertise on Cable networks."



21%

"I'm inclined to purchase products & services from companies that advertise on Cable & Broadcast networks."

Six Advertising Questions…

Attention?	Cable
Can We Talk?	Cable
Interested?	Cable
Might You Learn?	Cable
Our Advertisers?	Cable
Can We Close The Deal?	Cable

We Don’t Mean To Intrude…

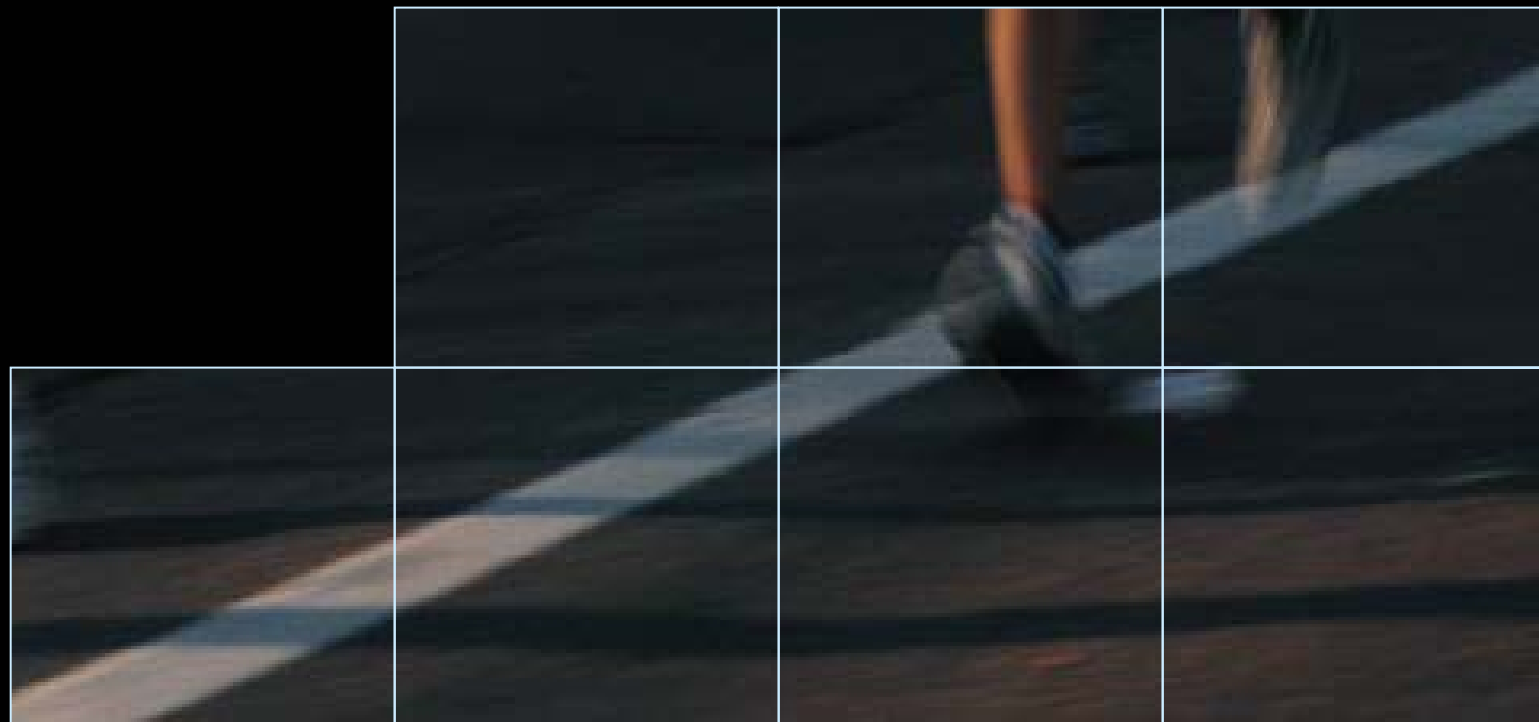
But What About “Clutter”

Is it clutter?



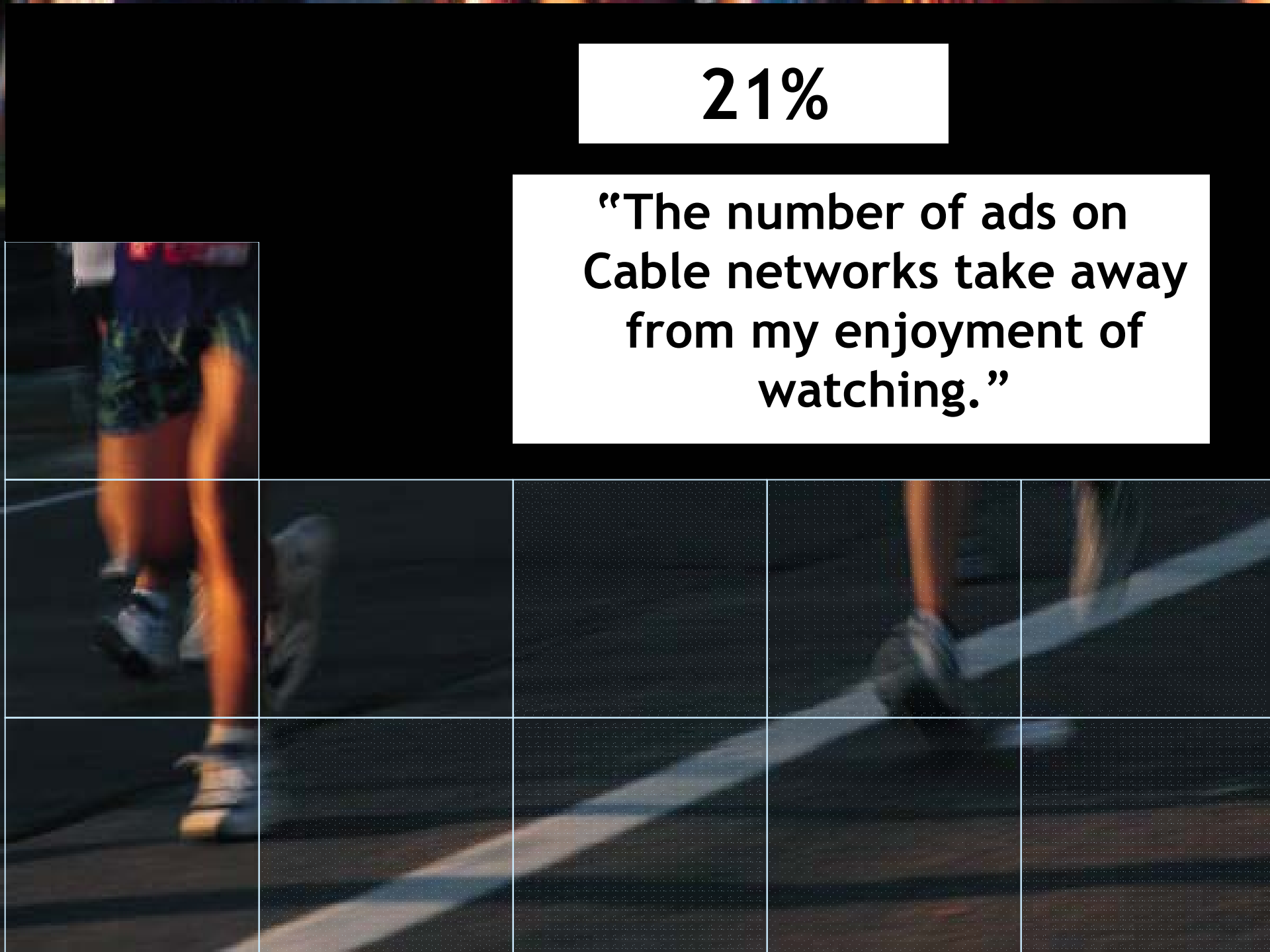
34%

"The number of ads on Broadcast networks take away from my enjoyment of watching."



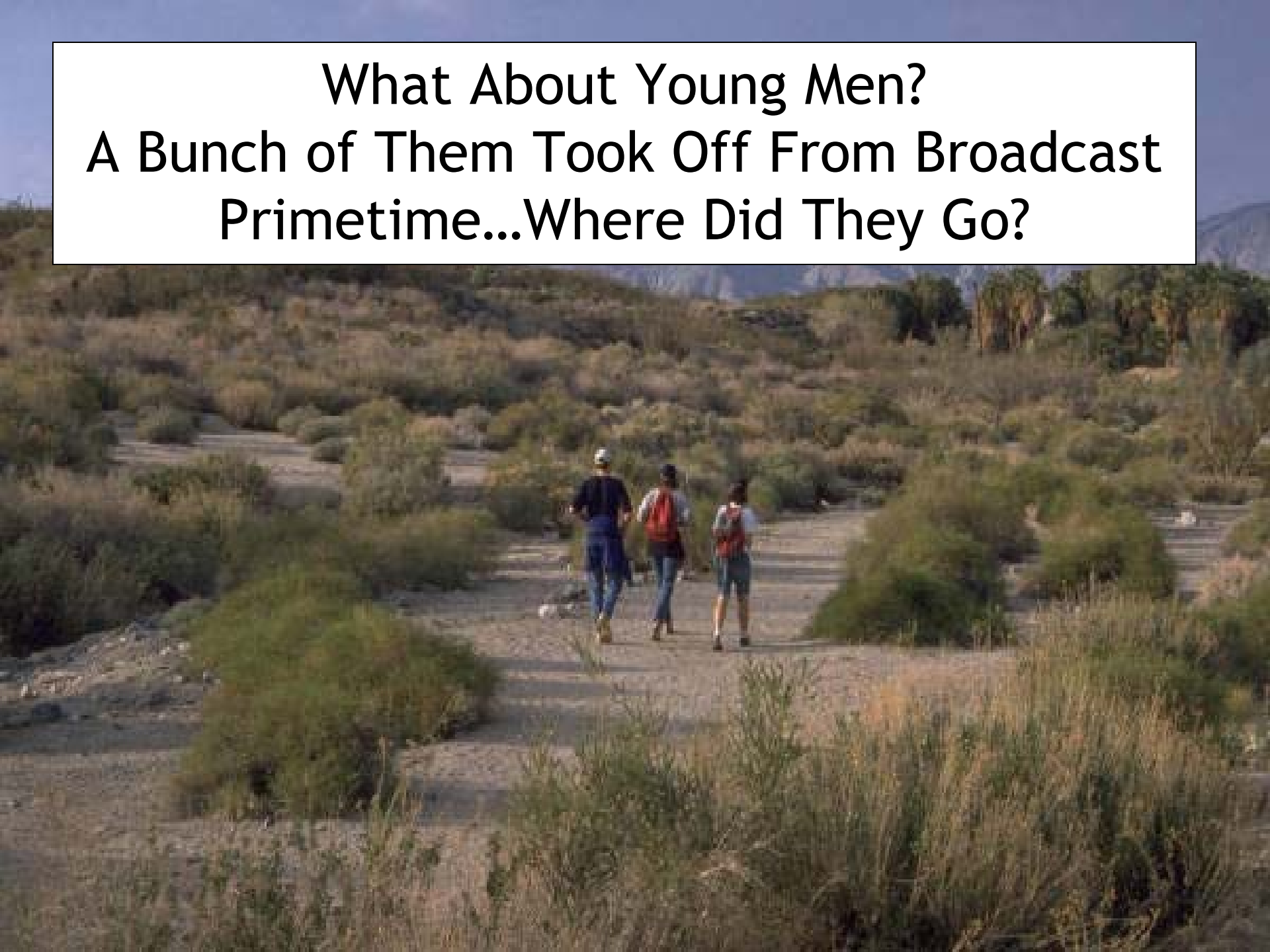
21%

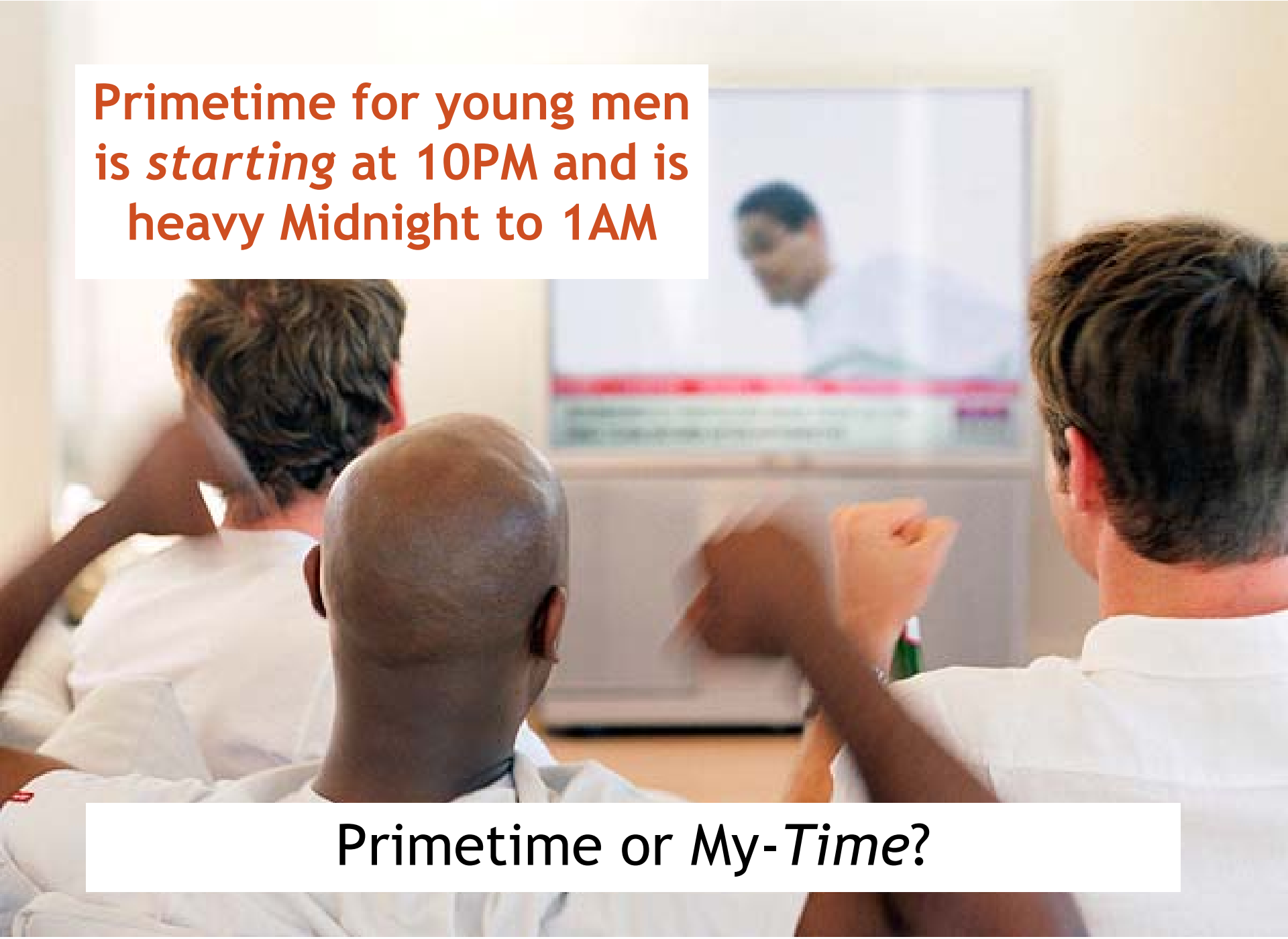
“The number of ads on Cable networks take away from my enjoyment of watching.”

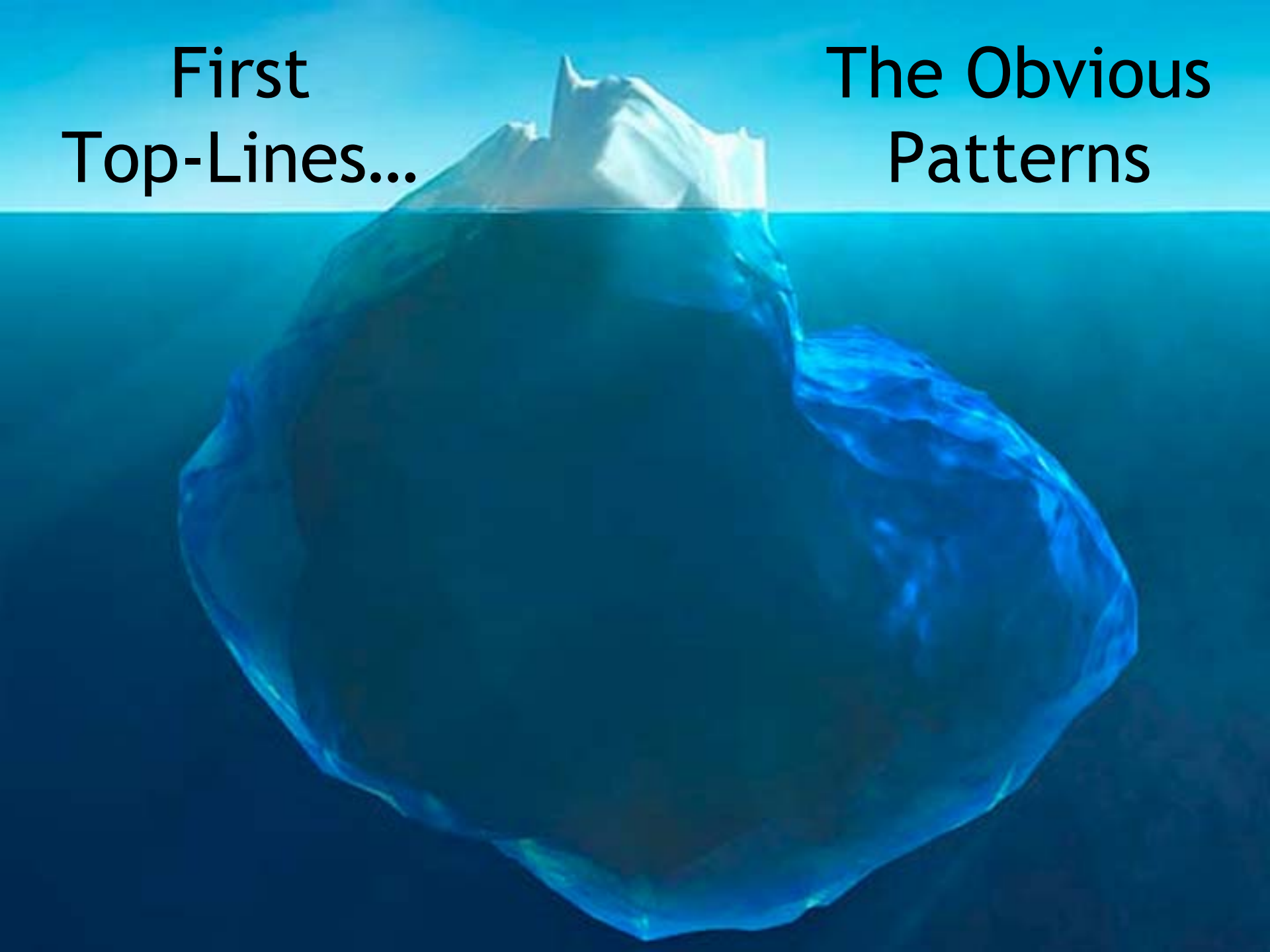


There Was Another Question We Couldn’t Resist..

What About Young Men?
A Bunch of Them Took Off From Broadcast Primetime…Where Did They Go?




Primetime for young men is *starting* at 10PM and is heavy Midnight to 1AM
Primetime or My-*Time*?


First
Top-Lines…
The Obvious
Patterns

Ten Questions…

Loyal?	Cable
Anticipated?	Cable
Best Shows?	Cable
Not Anywhere Else?	Cable
Personal?	Cable
You'd Miss Them?	Cable
Water Cooler?	Cable
Appointment TV?	Cable
Always Worth It?	Cable
Want More?	Cable

Six Advertising Questions…

Attention?	Cable
Can We Talk?	Cable
Interested?	Cable
Might You Learn?	Cable
Our Advertisers?	Cable
Can We Close The Deal?	Cable

What Is In The Next Wave?



Hundreds of Questions About The Hundred-Plus Questions

By Gender?

By Age?

By Viewing Segment?

By Attitudes?

Etc., Etc., Etc., Etc., Etc.,

Thank You!


OneTV
World