

“The Changing Media Landscape”

Born in	2005
1981	24
1979	26
1977	28
1975	30
1973	32
1971	34
1969	36
1967	38
1965	40
1964	
1963	42
1961	44
1959	46
1957	48
1955	50
1953	52
1951	54
1949	56

1964

Baby
Boomer
cutoff

Non-Linear

- Now
- User
- Knows how and where to get **more**
- Expects dialogue
- Embraces change
- Demands control

Linear

- Appointment
- Viewer
- Waits for more
- Resists change
- Cedes control

Active Tools

Tivo

ipod

YouTube

Flickr

Google

**My
Space**

Slingbox

Mobile

Born in	1990	1995	2000	2003	2005	2010	2015	2020
1995	0	0	5	8	10	15	20	25
1993	0	2	7	10	12	17	22	27
1991	0	4	9	12	14	19	24	29
1989	1	6	11	14	16	21	26	31
1987	3	8	13	16	18	23	28	33
1985	5	10	15	18	20	25	30	35
1983	7	12	17	20	22	27	32	37
1981	9	14	19	22	24	29	34	39
1979	11	16	21	24	26	31	36	41
1977	13	18	23	26	28	33	38	43
1975	15	20	25	28	30	35	40	45
1973	17	22	27	30	32	37	42	47
1971	19	24	29	32	34	39	44	49
1969	21	26	31	34	36	41	46	51
1967	23	28	33	36	38	43	48	53
1965	25	30	35	38	40	45	50	55
1963	27	32	37	40	42	47	52	57
1961	29	34	39	42	44	49	54	59
1959	31	36	41	44	46	51	56	61
1957	33	38	43	46	48	53	58	63
1955	35	40	45	48	50	55	60	65
1953	37	42	47	50	52	57	62	67
1951	39	44	49	52	54	59	64	69
1949	41	46	51	54	56	61	66	71
1947	43	48	53	56	58	63	68	73
1945	45	50	55	58	60	65	70	75
1943	47	52	57	60	62	67	72	77
1941	49	54	59	62	64	69	74	79
1939	51	56	61	64	66	71	76	81
1937	53	58	63	66	68	73	78	83
1935	55	60	65	68	70	75	80	85
1933	57	62	67	70	72	77	82	87

Attention

- Requested
- Engaged
- Measurable

Non-Linear

Linear

Four-Screen Categorization

- 1st**
TV Screen
- Live TV
 - DVD/VCR
 - DVR Playback
 - Game Console



- 2nd**
Computer Screen
- Web
 - Email
 - IM
 - Software
 - Computer Video



- 3rd**
Mobile Screen
- Talk
 - Text
 - Web
 - Mobile Other (e.g. camera)
 - Mobile Video



- 4th**
All Other Screens
- Environmental
 - GPS Navigation
 - In-Cinema Movie



MOBILE

Cell Phones are Important

Those who say it would be very hard to give up ... (among those who use each device)			
	2002	2006	2007
Cell phone	38%	43%	51%
Internet	38	38	45
Television	47	44	43
Landline telephone	63	48	40
Email	35	34	37
Blackberry or wireless email device	6	22	36

Source: *Pew Internet & American Life Project Surveys.*

Mobile data and communications activities

(among those who have a cell phone or personal data assistant)

	% of cell/PDA users who have <u>ever</u> done this	% of cell/PDA who do this <u>on typical day</u>
Send or receive text messages	58%	31%
Take a picture	58	15
Play a game	27	8
Send or receive email	19	8
Access the internet for news, weather, sports, or other information	19	7
Record a video	18	3
Play music	17	7
Send or receive instant messages	17	6
Get a map or directions to another location	14	3
Watch video	10	3

Source: Pew Internet & American Life Project Survey, December 2007, n =1,704 for those with cell phones or PDAs..
Margin of error is +/- 3 points.

Mobile data and communications activities: by race

(Those who have a cell phone or personal data assistant who have done one of listed activities on a typical day)

	White	Black	Hispanic
Send or receive text messages	28	34	42
Take a picture	14	21	20
Play a game	6	11	15
Send or receive email	7	7	9
Access the internet for news, weather, sports, or other information	7	9	10
Record a video	3	4	3
Play music	5	10	12
Send or receive instant messages	4	9	12
Get a map or directions to another location	3	2	4
Watch video	2	4	2
Percent who have done at least one of these activities	38%	50%	56%
Median number of activities <u>ever</u> done	0	0	1
Number of cases	1,304	158	129

Source: Pew Internet & American Life Project Survey, December 2007, n = 1,704 for those with cell phones or PDAs. Margin of error is +/- 3 points. Survey conducted in English.

Mobile data and communications activities: by Age
 (Those who have a cell phone or personal data assistant
 who have done one of listed activities on a typical day)

	18-29	30-49	50-64	65+
Send or receive text messages	60	32	14	2
Take a picture	31	14	6	3
Play a game	16	8	3	1
Send or receive email	10	9	7	2
Access the internet for news, weather, sports, or other information	14	7	3	1
Record a video	6	2	1	**
Play music	16	6	2	*
Send or receive instant messages	9	7	3	2
Get a map or directions to another location	6	3	2	
Watch video	6	3	1	1
Percent who have done at least one of these activities	73%	57%	23%	9%
Median number of activities done on <u>typical day</u>	1	0	0	0
Number of cases	311	616	456	310

Bing to Replace Google on iPhone

- Mobile advertising and mobile search is a growing market and one Google will not want to concede to Bing which is slowly but surely increasing in popularity.
- Nielsen Co's latest figures showed that of those who use mobile search, 86% used Google compared to 11% for Bing.

SOCIAL MEDIA

Social is Mobile

- 73% of Blackberry owners have downloaded 5 or fewer applications
- 72% of iPhone owners have downloaded 10 or more applications
- 37% listed Facebook as one of their top three most utilized apps and 18% claim it's their favorite app.

Accounts Holders With Social Networking Websites and Accessed from Smartphone (% of Respondents)					
	Social Site				
Smartphone Type	Facebook	MySpace	Classmates.com	Twitter	Linkedin
iPhone	71%	22	4	26	5
Blackberry	44	19	3	10	4
Palm	33	17	5	15	1
Total	45	19	4	15	3

Source: Compete, September 2009

Social is Mobile

- Advertising Age reported a 400% surge in mobile video uploads to YouTube, attributed to the new iPhone 3GS
- The mobile web version of YouTube has well over 4.6 million users that log in many times a month
- 80% of Twitter usage is on mobile devices