



Life Stage: Its Impact on the Future of Traditional and Emerging Media

A national pilot research study

February 2010

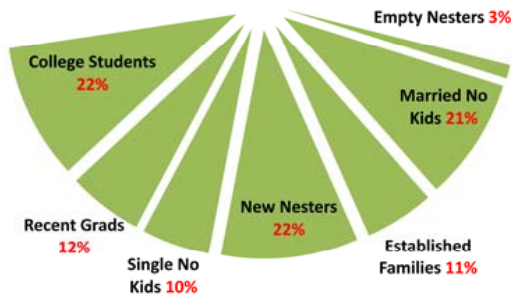
LIFE STAGE RESEARCH



In conjunction with survey partners Hallmark Channel and the Entertainment Technology Center at the University of Southern California (ETC), E-Poll Market Research has concluded a study of U.S. media consumption, revealing that Americans' media behavior is most greatly affected by their stage in life, rather than demographic or economic factors. The study, titled **“Life Stage: Its Impact on the Future of Traditional and Emerging Media,”** explores the attitudes and traces the distinct and often contrasting behaviors of eight major Life Stage groups, including Teens, College Students, Recent Grads, Single No Kids, New Nesters, Established Families, Married No Kids and Empty Nesters.

The wealth of information captured in the survey reveals that individuals in different Life Stages can have very similar demographic profiles but different attitudes and media usage. For example, the 18 – 49 demographic group familiar to TV and advertising executives is made up of people in seven different stages, with College Students, New Nesters and Married No Kids comprising nearly equal proportions. Three of the Life Stages have a median age of 37 or 38. Yet when examining behavior, the Life Stages are distinct and exhibit clear differences.

The 18 to 49 Demographic Includes Many Life Stages



“Life Stage: Its Impact on the Future of Traditional and Emerging Media” is a national pilot research study to examine the impact of Life Stages on emerging media. Further studies will be fielded in the coming months to gain additional insight into key consumer trends that facilitate cross-industry discussions about today’s reality and the future of potential digital entertainment offerings. For more information about Life Stage research, please contact E-Poll Market Research at 877-MY-EPOLL or www.epollresearch.com



LIFE STAGE PROFILE: TEENS



TV Signal: Over index on satellite vs. other groups, 37%, vs. 32% digital cable, 29% basic

Hours Spent Watching: Low compared to other groups 3.6 hours per day – solitary viewers

Primetime Viewing: Low compared to other groups – 52% watch 5 or more days

Change in Viewing: Over-index on spending less time watching TV this year: 43%

Main Reasons I Watch TV: #1 To watch favorite shows, #2 be entertained, #3 laugh, #4 relax/unwind, #5 To pass the time (they have a lot of leisure time)

DVR Use: Below average – 27% use, but 41% say they are increasing the time they spend with DVR.

Video Gaming Frequency: Over index on all gaming platforms; console, handheld, PC/Laptop, & cell phone, Smartphone

Change in Playing: Over-index on spending less time playing video games – 36% compared to last year

Movie Going Frequency: Highest frequency compared to other groups

Change in Viewing: Over-index on spending more time going to movies– 37% compared to last year

Frequency of Online Viewing: Over index on watching clips and full TV programs/movies online as well as user generated content. Most likely to watch user generated content compared to other groups

Visit Social Networking Sites: Over index on frequency of visits – 55% visit once a day or more

Cell Phone Use: Most have a cell phone 80%, with remainder using a Smartphone only or both. 5% have neither. 17% connected to Internet

What I Do Most Often on My Cell Phone: Equally likely to text and talk on a weekly basis. Over index on texting, and taking pictures.

Smartphone Use: Average usage at 12% Smartphone /PDA only and 4% both cell phone and Smartphone/PDA

DVD Usage: Below average, least likely to watch (48% “never”)

Gender: 50% Male/50% Female

Median Age: 15

Status: 100% Single

Children in HH: None of their own

Median Income: Mom & Dad pay for most entertainment related options

Employment: Over one quarter employed part time., another 16% looking for work

Median Household Size: 4.5

Education: 73% Grade School, 28% High School

Own/Rent: 59% own, 25% rent, 16% don't know

LIFE STAGE PROFILE: COLLEGE STUDENTS



Gender: 53% Male/47% Female

Median Age: 22

Marital Status: 15% married, 72% single, 10% couple living together, 3% divorced

Median HH Size: 3.6

Employment: 35% employed part time, 18% employed full time

Median Income: Below Avg. - \$41.1, 15% don't know

Education: 46% some college/2 year 65%, 4 year degree/post-grad 12%

Own/Rent: 47% own, 42% rent, 10% don't know

Life Satisfaction

Family Relationships: Average importance and satisfaction

Finances: Lowest importance compared to other segments, and average satisfaction

Life Changes in Past 12 Months: Getting a part time job, graduation, moving to a new home, over index on positive financial change.

Media Use

TV Signal: Over index slightly on digital cable vs. other groups

Hours Spent Watching: Low compared to other groups 4.3 hours per day – usually watch alone

Primetime Viewing: Lowest prime time viewing

DVR Use: Average overall use – 36% use, but 36% say they are increasing the time they spend with DVR.

Video Gaming Frequency: Over index on console gaming and slightly higher than average handheld. Average gaming on other platforms

Movie Going Frequency: Highest frequency along with teens

Online Video Viewing: Over index on watching full TV programs/movies online as well as user generated content. Most likely to watch full TV programs compared to other groups

Visit Social Networking Sites: Highest frequency, along with Teen segment – 52% visit once a day or more. Most likely to have profiles on multiple sites (44%)

Cell Phone use: Most have a cell phone 75%, over index slightly on Smartphone/PDA only (18%). Over index on Internet connection (22%)

What I Do Most Often on My Cell Phone: Average on most activities – mainly make personal calls. Over index on texting.

Frequency of DVD Viewing: Average to slightly below average

LIFE STAGE PROFILE: RECENT GRADS



Gender: Male 51%, Female 49%

Median Age: 28

Marital Status: 46% Single, 41% Married, 11% Couple living together

Median HH Size: 2.8

Children in HH: 21% have children; median age 5

Employment: 70% full time, 15% part time, 5% seeking

Income: Above Avg. - \$63K

Education: 62% have a 4 year degree, 38% have at least some post graduate work

Own/Rent: 49% own/48% rent

Life Satisfaction

Family Relationships: Average importance and satisfaction

Finances: Average importance and above average satisfaction . Most likely to say they are better off financially than last year.

Life Changes in Past 12 Months: Most likely to have a positive financial change, moved to a new home and got a new job.

Media Use

TV Signal: Over index slightly on digital cable vs. other groups

Hours Spent Watching: Low compared to other groups 3.6 hours per day – solitary viewers

Primetime Viewing: Low compared to other groups – 52% watch 5 or more days

DVR Use: Above average frequency– 42% use, and 38% say they are increasing usage

Video Gaming Frequency: Over index on console gaming and slightly higher than average handheld. Average gaming on other platforms

Movie Going Frequency: Over index on console gaming, and cell phone/Smartphone gaming

Online Video Viewing: Over index on watching clips of TV programs (not full programs) and user generated content. Average viewing of all different types of content

Visit Social Networking Sites: Over index on frequency of visits – 35% visit once a day or more and have profiles on multiple sites.

Cell Phone Use: : Least likely to have a cell phone – 68%, and most likely to have a Smartphone/PDA (23%)

What I Do Most Often on My Cell Phone: Personal calls, text messaging, business calls

Frequency of DVD Viewing: Below average

LIFE STAGE PROFILE: NEW NESTERS



Gender: 51% Female/49% Male

Median Age: 37

Marital Status: 85% Married

Median HH size: 4.1

Children: 100% have kids under 13, median age 6

Employment: Over index on home makers (25%) and employed full time (60%)

Median Income: Above Avg.- \$65K

Education: Above Avg. - 50% have 4 year college or higher

Own/Rent: 68% own home

Life Satisfaction

Family Relationships: Over index on importance and average satisfaction

Finances: Average importance and average satisfaction compared to other segments

Life Changes in Past 12 Months: Over index on becoming a first time parent or having another child

Media Use

TV Signal: Under index on basic cable and antenna. Most likely to have digital/satellite channels

Hours Spent Watching: Average – 4.8 hours per day – tend to view with spouse and kids or kids only

Primetime viewing: Average prime time viewing

DVR Use: Over index on use (46%) and frequency of use say they are increasing the time they spend with DVR

Video Gaming Frequency: Over index on console and cell phone/Smartphone gaming

Movie Going Frequency: Lowest frequency after “Empty Nesters”

Online Video Viewing: Most likely to watch clips of breaking news/news stories – average usage overall

Visit Social Networking Sites: Slightly above average – 31% visit once a day or more

Cell Phone Use: : Most have a cell phone 75%, over index on Smartphone/PDA only (18%)

What I Do Most Often on My Cell Phone: Equally likely to text and talk on a weekly basis. Over index on texting, and taking pictures.

Frequency of DVD Viewing: Over index, highest frequency among the segments. They are most likely to have a subscription to an online DVD rental service and portable DVD player.

LIFE STAGE PROFILE: ESTABLISHED FAMILIES



Gender: 51% Female/49% Male

Median Age: 51

Marital Status: 70% Married

Median HH size: 3.7

Children: 100% kids over 13 in HH,
median age 20

Employment: 46% employed full time,
16% homemakers, 15% retired

Median Income: Average - \$55K

Education: Below Average; 34% have
a 4 year degree or higher

Own/Rent: 79% own home

Life Satisfaction

Family Relationships: Over index on importance and average satisfaction

Finances: Over index on importance and below average satisfaction

Life Changes in Past 12 Months: Most likely to have had a negative change in family's financial situation. Over index on having a child move back home

Media Use

TV Signal: Average Digital Cable (45%)/Satellite penetration (25%)

Hours Spent Watching: Over index on TV viewing, tend to watch with spouse or alone, less likely to watch with kids compared to New Nesters.

DVR Use: Slightly below average use/frequency of use, but spending more time using in the past year

Video Gaming Frequency: Average on PC/Laptop, handheld cell phone/Smartphone – over index in homes with teens

Movie Going Frequency: Average - slightly above average in homes with teens

Online Video Viewing: : Lower than average except for clips of breaking news/news stories. Least likely, except for Empty Nesters, to watch full episodes of TV programs

Visit Social Networking Sites: : Lower than average – 20% visit once a day or more

Cell Phone Use: Over index on cell phone 80% vs. Smartphone/PDA use (8% Smartphone/PDA only)

What I Do Most Often on My Cell Phone: Personal calls, text messaging, business calls.

Frequency of DVD viewing: Above average DVD viewing - over index on the value of their online DVD rental subscription and on portable DVD player use

LIFE STAGE PROFILE: MARRIED NO KIDS



Gender: 54% Female/46% Male

Median Age: 38

Marital Status: 100% Married

Median HH size: 2.1

Children: None

Employment: Most are employed full time 62%, 16% part time, 10% retired

Median Income: Highest among the groups - \$70K

Education: Most have 4 year college degrees or higher – 65% (over index)

Own/Rent: 79% own home

Life Satisfaction

Family Relationships: Average importance and average satisfaction

Finances: Average importance and average satisfaction

Life Changes in Past 12 Months: This group is least likely to report experiencing any major life changes in the past 12 months. They under index on any negative financial experiences and over index on moving to a new home.

Media Use

TV Signal: Over index satellite (32%), but largest proportion has digital cable (42%), average basic cable and antenna

Hours Spent Watching: Average number of TV viewing hours. Over index on watching with spouse, under index on solitary viewing

DVR Use: Over index on overall use, and frequency

Video Gaming Frequency: Average on all platforms; console, PC/Laptop, handheld cell phone/Smartphone

Movie Going Frequency: Average

Online Video Viewing: Average viewing. Usually to watch clips of breaking news/news stories and user generated content. Over index on downloading video for free (peer to peer network or use bit torrent client) (21%)

Visit Social Networking Sites: Average – 26% visit once a day or more

Cell Phone Use: Slightly below average cell phone 77% and under index on cell phone connection to Internet. Slightly above average Smartphone usage

What I Do Most Often on My Cell Phone: Personal calls, text messaging, business calls

Frequency of DVD Viewing: Slightly below average DVD viewing - over index on the value of their online DVD rental subscription and on portable DVD player use

LIFE STAGE PROFILE: SINGLE NO KIDS



Gender: 38% Female/62% Male

Median Age: 39

Status: 100% Single

Median HH size: 1.8

Children: None

Employment: Over index on full time 53%, slightly higher than average % seeking employment

Median Income: Below average; \$42K

Education: Over index on 4 year college +; 49%

Own/Rent: 53% own

Life Satisfaction

Family Relationships: Below average importance – lowest except for teen group. Low satisfaction

Finances: Above average importance and average satisfaction

Life Changes in Past 12 Months: This group over indexes on having lost a job.

Media Use

TV Signal: Average satellite and cable penetration

Hours Spent Watching: Over index slightly on TV viewing hours 5.0 per day. Highest solitary viewing. Fewest TV's in household

DVR Use: Slightly below average overall use, but those who do use, report high frequency – 55% record half to more than half of all programs watched

Video Gaming Frequency: Over index on console and cell phone/Smartphone gaming

Movie Going Frequency: Over index

Online Video Viewing: Over index on user generated content and original programming made for Internet viewing. Average news, TV, movie viewing

Visit Social Networking Sites: Average – 28% visit once a day or more

Cell Phone Use: Under index on cell phone usage 72%. Singles are most likely to have cell phones connected to the Internet

What I Do Most Often on My Cell Phone: Personal calls, text messaging, business calls (over index). Higher than average Internet-related activities; email, gaming

Frequency of DVD Viewing: Slightly above average DVD viewing - over index on the value of their online DVD rental subscription and on portable DVD player use

LIFE STAGE PROFILE: EMPTY NESTERS



Gender: 51% Female/49% Male

Median Age: 63

Marital Status: 90% Married

Median HH size: 2.5

Children: 100% have kids not living at home, median age 27

Employment: 49% retired; 19% employed full time, 15% part time

Median Income: Slightly below average - \$49K

Education: 32% 4 year college or higher

Own/Rent: 89% own

Life Satisfaction

Family Relationships: Highest importance among all the groups, and highest satisfaction

Finances: Average importance, average satisfaction

Life Changes in Past 12 Months: This group over indexes on experiencing a negative change in financial situation. They are the group most likely to say they became a grandparent

Media Use

TV Signal: Over index on satellite 33%, average digital cable penetration 44%

Hours Spent Watching: Highest number of hours spent watching TV, along with Established Families; 4.4 hours per day

DVR Use: Slightly below average on overall ownership

Video Gaming Frequency: Under index on all gaming except PC/laptop (average frequency)

Movie Going Frequency: Least likely to go to movies

Online Video Viewing: Over index on clips of breaking news/news stories – highest among all groups. They report below average viewing of all other content

Visit Social Networking Sites: Lowest frequency – 18% visit once a day or more, 50% never visit

Cell Phone use: Most have only a cell phone (89%), with very few saying they have either a Smartphone/PDA only or both a cell and Smartphone/PDA (8%)

What I Do Most Often on My Cell Phone: Personal calls, with few saying they use text messaging, and make business calls

Frequency of DVD Viewing: Lowest DVD viewing after teens

LIFE STAGE RESEARCH: KEY FINDINGS

DVR

Usage of the DVR is significant among members of the Teen, College Student and Recent Grad Life Stages and increases steadily through marriage. The value of this device peaks among New Nesters with very young children and begins to decrease as kids get older and then leave home.

Online Content

Online viewing of video content is high among younger Life Stages, particularly user generated and TV program content, but family formation slows this activity significantly. Online viewing among Established Families continues to decline but Empty Nesters use of online breaking news explodes.

Identifying video content that engages and satisfies members of all Life Stages is critical for managing members of these groups through the value chain of the devices which distribute online content.

Gaming

Gaming exhibits significant use among members of the Young Adults and Singles Life Stages. As children arrive, gaming among parents decreases continually and drops when children leave the home. Among Empty Nesters, PC gaming is the platform of choice.

The primary benefit for all gamers is entertainment. Teens like the competition but the remaining members of the Life Stages value gaming's ability to relax them. Surprisingly, from College Grads through Empty Nesters, gaming is used to relieve stress!

Social Networking

Members of the first two Life Stage drive social networking for myriad reasons. Time deprived New Nesters continue the usage as a way of networking and staying connected with friends but as children age, adults in established families decrease their use. Not surprisingly, the Empty Nesters continue the decline in usage.

Significantly, as the use of social networks for private communication increases, usage of standard email will most likely start to decrease

Smart Phones/PDAs

Smart phones/PDAs serve their users better than any other device and are highly valued by owners. Ownership of smart phones becomes important for some members of the first two Life Stages (Recent Grads and Single, No Kids) but wanes as children arrive in the home. Currently, the price/value equation does not appeal to the Established families and Empty Nesters.

Television

TV is a very important leisure time activity to only 20% of these respondents but is the most often used. TV viewing increases with each Life Stage, with Teens and College Students reporting the lowest prime time and overall viewing. Empty Nesters report the greatest time spent and satisfaction with this activity, while Recent Grads are least satisfied.

LIFE STAGE RESEARCH: IMPORTANCE OF ACTIVITY

Total	Teens	College Student	Recent College Grads	New Nesters	Established Families	Married No Kids	Single No Kids	Empty Nester
Being with family members 58%	Attending school 77%	Attending school 75%	Being with family members 57%	Being with family members 69%	Being with family members 66%	Being with family members 56%	Using the Internet 48%	Being with family members 69%
Using the Internet 46%	Being with friends 57%	Using the Internet 54%	Using the Internet 46%	Using email 48%	Using the Internet 43%	Using the Internet 47%	Using email 46%	Using email 43%
Using email 43%	Listening to music 54%	Studying 50%	Using email 42%	Using the Internet 45%	Using email 37%	Using email 46%	Being with friends 45%	Using the Internet 42%
Being with friends 37%	Using the Internet 52%	Being with family members 50%	Being with friends 40%	Being with friends 29%	Being with friends 29%	Being with friends 37%	Being with family members 41%	Being with friends 36%
Attending school 29%	Studying 47%	Using email 49%	Exercising 28%	Working at your employer's location 28%	Working at your employer's location 27%	Reading books/magazines/newspapers 30%	Exercising 34%	Reading books/magazines/newspapers 30%
Exercising 27%	Being with family members 42%	Being with friends 45%	Reading books/magazines/newspapers 27%	Exercising 28%	Reading books/magazines/newspapers 23%	Listening to music 25%	Listening to music 32%	Travelling 26%
Working at your employer's location 27%	Participating in hobbies 41%	Using cell phone/Smartphone for texting 33%	Travelling 26%	Reading books/magazines/newspapers 27%	Doing housework 22%	Exercising 25%	Working at your employer's location 30%	Working at your employer's location 24%
Reading books/magazines/newspapers 27%	Using cell phone/Smartphone for texting 38%	Listening to music 32%	Listening to music 24%	Watching TV 27%	Listening to music 21%	Travelling 24%	Reading books/magazines/newspapers 28%	Exercising 23%
Listening to music 26%	Commuting to work or school 38%	Exercising 32%	Working at your employer's location 24%	Listening to music 26%	Participating in hobbies 20%	Working at your employer's location 21%	Watching TV 26%	Watching TV 20%
Studying 22%	Exercising 36%	Commuting to work or school 31%	Attending school 24%	Participating in hobbies 23%	Travelling 20%	Watching TV 21%	Using cell phone/Smartphone for conversations 20%	Listening to music 18%

LIFE STAGE RESEARCH: MEDIA USAGE

Affinity for Media Technologies - "Very Hard to Give Up"

Product / Service	Highest		Lowest	
Laptop	College Students	80%	Established Families	54%
Smartphone	Single No Kids	64%	Empty Nesters	32%
TiVo	Empty Nesters	63%	Teens	21%
HD Channels	Married No Kids	33%	Teens	9%
DVD Player	New Nesters	32%	Teens	16%
HDTV	New Nesters	44%	Teens	13%
iPod with video	Teens	51%	Established Families	24%
Home Theater System	Single No Kids	26%	Teens	8%
iPod with/out video	College Students	40%	Empty Nesters	18%
Video game Console	College Students	29%	Recent Grads	16%
Subscription to DVD rental service by mail	New Nesters	30%	Recent Grads	11%
Handheld Game system	Single No Kids	30%	Recent Grads	3%
Portable DVD player	College Students	25%	Teens	7%
VOD	New Nesters	19%	Teens	7%

Source: Life Stage: Its Impact on the Future of Traditional and Emerging Media, 2009

LIFE STAGE RESEARCH: SURVEY INFORMATION

About The Study

“Life Stage: Its Impact on the Future of Traditional and Emerging Media” is a national pilot research study to examine the impact of life stages on emerging media. Further studies will be fielded in the coming months to gain additional insight into key consumer trends that facilitate cross-industry discussions about today's reality and the future of potential digital entertainment offerings.

Methodology

Source: Life Stage: Its Impact on the Future of Traditional and Emerging Media. This online survey was conducted by E-Poll Market Research among a nationally representative sample of 1,440 individuals age 13 - 54. The margin of sampling error at 95% confidence for aggregate results is +/- 3%. Sampling error is larger for subgroups of the data. The survey was fielded July 10 – 24, 2009.

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