

Most-detailed study yet of consumer video viewing suggests some rethinking is in order

If there's a window handy, open it and prepare to toss out some commonly held beliefs about Americans' exposure to and use of video media.

A pioneering study conducted on behalf of the Nielsen-funded Council for Research Excellence (CRE) by Ball State University's Center for Media Design (CMD) and Sequent Partners dispels several popular notions about video media use; for example, that it's people at the generational extremes, retirees and young people, who on average consume the most video media (actually, it's late baby boomers ages 45-54). At the same time, it confirms that traditional "live" television remains the proverbial "800-pound gorilla" in the video media arena.

Results of the \$3.5 million yearlong Video Consumer Mapping (VCM) study, in which participants were observed directly throughout the day by CMD researchers, were released by representatives of the CRE, Nielsen, Ball State and the analytical firm Sequent Partners, during a major press event March 26 in New York's famed Time-Life Building.

Using handheld smart keyboards equipped with a custom media collector program developed by Ball State, the observers recorded — in 10-second increments — consumer exposure to visual content presented on any of four categories of screens: traditional television (including live TV as well as DVD/VCR and DVR playback); computer (including Web use, e-mail, instant messaging and stored or streaming video); mobile devices such as a Blackberry or iPhone (including Web use, text messaging and mobile video); and "all other screens" (including display screens in out-of-home environments, in-cinema movies and other messaging and even GPS navigation units).

All told, the VCM study generated data covering more than three-quarters of a million minutes or a total of 952 observed days, making it the largest and most extensive observational study of media usage ever conducted.

Key findings

In addition to the revelation that consumers in the 45-54 age group average the most daily screen time (just over 9 1/2 hours), the VCM study found the average for all other age groups to be "strikingly similar" at roughly 8 1/2 hours — although the composition and duration of devices used by the respective groups during the day varied.

The research also found that:

- Contrary to some recent popular media coverage suggesting that more Americans are rediscovering "free TV" via the Internet, computer video tends to be quite small with an average time of just 2 minutes (a little more than 0.5 percent) a day.
- Despite the proliferation of computers, video-capable mobile phones and similar devices, TV in the home still commands the greatest amount of viewing, even among those ages 18-24; thus, in the eyes of the researchers, appearing to dispute a common belief that Internet video and mobile phone video exposure among that group (and the next one up, ages 25-34) were sizeable in 2008.
- Even in major metropolitan areas where commute times can be long and drive-time radio remains popular, computing has replaced radio as the No. 2 media activity. Radio is now No. 3 and print media fourth.
- TV users were exposed to, on average, 72 minutes per day of TV ads and promos — again dispelling a commonly held belief that modern consumers are channel-hopping or otherwise avoiding most of the advertising in the programming they view.
- "Environmental" exposure outside the home, while still relatively small at just 2.8 percent of total video consumption today, could nearly double during the next few years. Currently, measurement of these screens is only just beginning with programs such as Nielsen On-location Media and Nielsen Online, though they may be given more importance soon, given their growing and strategic advertising role. \

For a more complete summary of these and other findings, please visit www.researchexcellence.com/news/vcmstudy.html.

Detail makes the difference

"What differentiates this study from all other attempts to measure video exposure at the consumer level is its scale, the range of media covered and the fact that it is focused on consumers first and the media second. It's not a study about TV or the Web or any other medium — it's about how, where, how often and for how long consumers are exposed to all media," said Mike Bloxham, director of insight and research for Ball State's CMD, which was selected to lead the project, in large part, because of its previous success with the influential Middletown Media Studies I and II.

An important finding of those earlier efforts, Bloxham explained, concerned the uncertainty of more historical methods of measurement and, in particular, various forms of self-report.

"Among the things we learned from those experiences is that people generally cannot report accurately how much time they spend with media," said Bloxham. "Some media tend to be over-reported whereas others tend to be under-reported — sometimes to an alarming extent. Clearly, that kind of variance puts in question one's ability to draw meaningful conclusions, and it convinced us that the observational method is the only real way to achieve accurate and reliable results."

Not only did the direct observation method employed during the VCM study produce unusually precise data, the quality of that information also enabled a type of analysis of media behavior in the U.S. that has never been achieved before, said Jim Spaeth, co-founder of Sequent Partners.

"Direct observation of consumers' use of media enables us to better understand their concurrent exposure to multiple media, often in the context of other life activities," Spaeth said. "Winning this 'competition for attention' is the most significant challenge media and advertising face today and having accurate information is a prerequisite for success."

Game changer?

Although the VCM study itself makes no specific recommendations regarding what the CRE or Nielsen should do with the results, CRE members have indicated the research was intended from the outset "to provide actionable and potentially game-changing insights."

"This landmark research study makes a significant contribution to our understanding of how consumers go about accessing content across all platforms within the context of their daily lives," said CRE Media Consumption and Engagement Committee Chair Shari Anne Brill, senior vice president and director of programming at Carat USA. "It also considerably advances the council's thinking regarding audience measurement priorities. Nothing of this magnitude has ever been attempted before and we expect that our entire industry will benefit from this research for years to come."

About the Council for Research Excellence

The Council for Research Excellence (CRE) is an independent research group created by The Nielsen Company and comprised of senior-level industry researchers representing advertisers, agencies, broadcast networks, cable, syndicators, local stations, and industry associations. The CRE is dedicated to advancing the knowledge and practice of audience measurement methodology. For more information, please visit www.researchexcellence.com.

About The Nielsen Company

The Nielsen Company is a global information and media company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and business publications (Billboard, The Hollywood Reporter, Adweek). The privately held company is active in approximately 100 countries, with headquarters in New York. For more information, please visit www.nielsen.com.

About Sequent Partners LLC

Sequent Partners is a brand and media metrics consultancy helping leading advertiser, media, and research companies through this accelerating transition in media to ultimately build brand value. The firm has worked with Ball State University since the Middletown Media Studies. Some of the company's other publicly visible engagements have included managing the client Steering Committee for the Project Apollo pilot and developing the measurement guidelines for

the new and explosively growing Out-of-Home Video Advertising Bureau (OVAB). For more information, please visit www.sequentpartners.com.

To read news coverage about the study, please visit the "Emerging Media" page of Ball State's Web site.

Survey finds smart phones transforming mobile lifestyles of college students

Once reserved for busy business executives, smart phones are now being incorporated into the mobile lifestyle of college students, says new research from Ball State University.

A recent survey of about 300 college students found that 27 percent own a smart phone as compared to the national average of 19 percent for working adults. Research also found that 99.7 percent of students have a mobile communications device and the rates of sending text messages, e-mail, photos and videos are increasing.

"College students are increasingly adopting cell phones — particularly the smart phone — as the core communication and entertainment device for their hectic lifestyles," said Michael Hanley, a journalism assistant professor who leads Ball State's mobile communications research program. "In the few years since instant messaging (IM) leaped from the computer to the cell phone, a new mobile lifestyle has evolved. And save for studying, the computer is quickly being left behind."

Hanley calls smart phones the "game changers" for mobile communications, forcing the industry to cater to the needs of technology-centered young adults in order to build a lifetime partnership.

"Smart phones, which are simply minicomputers that often feature touch screen applications, are popular with college students because the larger screens allow for more entertainment uses," he said. "I think the communications industry will build on this popularity among technology-savvy young people, adding more types of emerging media applications."

Hanley's latest study is part of his continued research into the mobile communication habits of young adults. He has conducted surveys of 4,907 college students twice annually since 2005, finding that:

- Text messaging has overtaken e-mail and IM as the main form of communication as 94 percent of students send and receive text messages.
About 62 percent of students admitted to texting while in class.
- Students use cell phones to keep in touch with family and friends with 59 percent texting, 17 percent using voice, 9 percent sending IMs and 7 percent using e-mail.
- Cell phone camera usage has surged, with 72 percent of respondents reporting that they take and send photographs via their cell phone, up from 30 percent in 2005.
- About 39 percent take and send video using their cell phone, up from 4 percent in 2005.

Hanley is one of several faculty members involved in Ball State's interactive media class (iMedia). Students in the yearlong class are developing and designing interactive news and advertising for a variety of platforms.

Allowing students to develop interactive programming is part of Ball State's Emerging Media Initiative (EMI), a \$17.7 million investment focusing the university's historic strengths in this area to accelerate benefits to the state of Indiana and give students innovative and entrepreneurial opportunities.

While today's mobile lifestyle has led to new opportunities for marketers to communicate directly with young adults through emerging media applications, there may be a potential cost, Hanley said.

Hanley points out that advertising on cell phones is a recent marketing phenomenon, with 52 percent of respondents receiving ads on their cell phone in the last few months, up from 24 percent in 2005.

Companies wanting to peddle the latest clothing trends, newest vehicles and cutting-edge computer technology to college-age students and recent graduates have little choice but to turn to cell phones, he said.

"I think the backlash is building because people perceive their cell phones as their personal way of communicating. In 2005, we found that 30 percent of students said they were annoyed at getting an advertisement, and that has grown to 48 percent in the most recent survey. What good is an ad if nearly half of your target market is not happy about receiving it?"

Grandson of India's late spiritual leader brings message of nonviolence to Ball State

The founder of the M.K. Gandhi Institute for Nonviolence will talk about integrity, social harmony and nonviolent struggle during a presentation March 30 at Ball State University.

"Lesson Learned From My Grandfather" is the title of the presentation by Arun Gandhi, grandson of India's legendary spiritual leader, Mahatma K. Gandhi. The event, free and open to the public, begins at 7 p.m. in Pruis Hall and is cosponsored by Ball State's Housing and Residence Life and Campus Activities Fund Board.

Arun Gandhi grew up in apartheid South Africa but was sent to live with his famous grandfather at age 12 after several altercations with neighborhood white and black residents due to his Indian background.

What followed was an 18-month stay with one of the world's greatest leaders that would give him the keys to the powerful philosophy of nonviolence and help shape the foundation for his life's work. He witnessed his grandfather leading the people of India in their revolutionary, nonviolent struggle for independence from British rule.

After heading successful projects for economic and social reform in India, Arun Gandhi came to the United States in 1987 to complete research for a comparative study on racism in America.

In 1991, Gandhi and his late wife, Sunanda, founded the M.K. Gandhi Institute for Nonviolence, which is now at the University of Rochester. The institute's mission is to foster understanding of

nonviolence and to put that philosophy to practical use through workshops, lectures and community outreach programs.

ON CAMPUS

Ball State's Paint 4 Peace encourages nonviolence with art

All faculty, staff and students are invited to help paint Ball State's pavement between Bracken Library and University Theatre April 2 as part of an event to promote nonviolence on school campuses.

The Ball State and Muncie communities will assist world-renowned artist Robert Guillemin, commonly known as Sidewalk Sam, in the creation of a 20-by-20 foot dove. The sidewalk mural will remain through July.

Student organizations or groups may reserve time slots to paint the dove between 10 a.m. and 5 p.m. April 2, but a reservation is not necessary to participate.

Throughout the day's events, discussion groups will be open for students' feedback on issues of violence within schools, such as bullying and discrimination. Ball State President Jo Ann M. Gora will moderate a panel on nonviolent communities to conclude the day at Pruis Hall at 7 p.m.

The panel will feature esteemed members of the community such as Bart Peterson, former mayor of Indianapolis and a Ball State faculty member, Eric King, superintendent of Muncie Community Schools, Frank Hood, former president of the Student Government Association, and Guillemin.

For more information about how to become involved, please visit www.paint4peace.com or call the Ball State Center for Peace and Conflict Studies at 765-285-1622.

Ball State announces Pulliam writing award recipient

A Seattle newspaper reporter will be honored April 8 by Ball State University for her article examining caregiving for family members.

Seattle Times reporter Maureen O'Hagan is the 2009 recipient of the Eugene S. Pulliam National Journalism Writing Award for her article "Aging father agonizes over fate of his son," part of the series "A Lifetime of Care."

The honor is part of an annual contest sponsored since 1960 by Ball State's Department of Journalism. The honor includes a \$1,500 award from the Pulliam family, former owners of the Indianapolis Star and other newspapers.

O'Hagan's story examines the contemporary issue of caregiving for family members. It describes the challenges facing an aging father in Washington state and his autistic adult son. Because of

his own declining health, the father confronts the difficult decision to institutionalize his seriously disabled child. O'Hagan spent months documenting the family's medical, financial and emotional concerns surrounding placement of the son in a supported-living home.

On April 8, O'Hagan will be recognized at the journalism department's annual awards luncheon. O'Hagan also will speak at 8 p.m. in Pittenger Student Center's Cardinal Hall as part of the department's Professional-in-Residence series. The title of O'Hagan's presentation is "Telling True Stories: Why It Matters."

Kovert Hawkins architectural design firm creates scholarship

Kovert Hawkins Architects Inc. in Jeffersonville, Ind., has given \$25,000 to create the Kovert Hawkins Scholarship. Owners Hal Kovert and John Hawkins graduated from Ball State in 1976 and 1982, respectively.

Kovert Hawkins architectural design firm was formed on July 1, 1985. Ball State alumnus James Lake joined the firm after he graduated in 1995 and became a principal in 2005. The firm began with the idea of developing a professional practice to serve Indiana communities, organizations and businesses. While its work has reached beyond the state borders, the firm has maintained the Hoosier focus as its core.

The principals of Kovert Hawkins believe the education they received at Ball State is a significant component in the firm's success. As the firm grows, it continues looking to Ball State for employees.

The scholarship is for incoming freshmen or transfer students pursuing a major within the College of Architecture and Planning. Recipients should have a grade point average (GPA) of 3.0 or higher on a 4.0 scale and a minimum SAT score of 1500 on a scale of 2400 or the equivalent on a similar exam, such as the ACT. Students are eligible for the renewable scholarship for all four years if the student continues to meet the stated criteria.

Availability of the Kovert Hawkins Scholarship is dependent upon an award selection process established by Ball State and its academic departments. For specifics about this scholarship, contact the College of Architecture and Planning at 765-285-5859.

Alumnus creates mathematical sciences scholarship in honor of his father

Ball State alumnus Raj Seekri of Dallas has donated \$25,000 in honor of his father to create the Ram Lal Seekri Endowed Scholarship. Raj Seekri earned his master's degree from Ball State in 1969. He received the Dallas Historical Society's 2008 Award for Excellence in Community Service.

The scholarship is for students pursuing majors in mathematical sciences and students who demonstrate financial need.

Availability of the Ram Lal Seekri Endowed Scholarship is dependent upon an award selection process established by Ball State and its academic departments.

For specifics about this scholarship, contact the Department of Mathematical Sciences at 765-285-8640.

For more information about other scholarships at Ball State, contact the Office of Scholarships and Financial Aid at 765-285-5600 or visit www.bsu.edu/finaid.

IN THE NEWS

Mike Bloxham, director of Insight and Research for the Center for Media Design

Bloxham was quoted in a March 5 Minonline article, "4As Report: What Do Consumers Really Want?" Consumers' desires and their preferred methods of media consumption were the main themes of the 4As conference in New Orleans. Professionals conducted focus groups of three consumer groups—millennials/Gen Y'ers (age 20-30), baby boomers and women age 25-54. They offered insight on their media consumption habits and their reactions to commercial messages. "I think (consumers are) looking for relevance, resonance and substance," Bloxham said.

Eric Dugan, director of the Biomechanics Laboratory

WTHR-TV quoted Dugan in a March 18 newscast, "Ball State Lab Helps Analyze Golf Swing." The Biomechanics Laboratory at Ball State is helping athletes perfect their golf swing, and the research may help doctors treat patients with impaired mobility. The swing is dissected through sensors on the floor and sensors on the athlete. High-speed motion capture cameras mounted around the room pick up on the 43 points of light on the athlete and take up to 480 frames per second. Computers use those points to map the swing, which is analyzed for quality of movement by studying the angles of the body. "Individuals that have had stroke, functional outcome after rehabilitation, children with cerebral palsy, (can benefit) using gait analysis to direct treatment intervention, surgical approaches," Dugan said.

Jennifer George-Palilonis, assistant professor of journalism

Poynter quoted George-Palilonis in a March 23 article, "Ball State Journalism Graphics Grads Ready to Work Across Platforms, Even if Newsrooms Aren't." She wants to help Ball State graphics students hit the ground running. George-Palilonis directs the sequence and sees versatility in multimedia skills as a major component of the students' success. "It's a very challenging endeavor, considering that the industry is in such a state of flux right now," she said.

President Jo Ann M. Gora

MSNBC quoted Gora in a March 17 article, "Universities Make Cases for More Money." Indiana's public universities went in front of lawmakers to state their cases for funding. Several of the state's public university presidents met at the governor's office before heading to the Senate Appropriations Committee. "We feel very strongly that what we offer is an incredible value, but we are dependent on state appropriations and we certainly would not make any decisions on tuition and fees until the state legislature acted," Gora said.

Michael Hicks, director of the Center for Business and Economic Research

The Indianapolis Star quoted Hicks in a March 14 article, "Affordability a Bright Note in Housing Sector." The Indianapolis housing market was recently named the most affordable nationwide for the final quarter of 2008 by the National Association of Home Builders/Wells Fargo Housing Opportunity Index. That marks the 14th consecutive quarter that the area has landed atop the index. "The Indianapolis area didn't share in hyper home valuation prices that many places in the country experience, so we're probably going to recover more quickly," Hicks said.

SPOTLIGHT

Recognitions

James McKenzie, Department of Physiology and Health Science, 2009 Warren E. Schaller Distinguished Service Award from the Indiana Society for Public Health Education.

Melinda Messineo, Department of Sociology, 2009 John F. Schnabel Distinguished Contributions to Teaching Award from the North Central Sociological Association.

Publications

Ryan Hourigan and **John Scheib**, College of Fine Arts, "Inside and Outside the Undergraduate Music Education Curriculum: Student Teacher Perceptions of the Values, Skills, Abilities and Understandings," *Journal of Music Teacher Education*, Vol. 18, No. 2, pages 48-61, 2009.

Presentations

Mike Bloxham, Center for Media Design, "The iTV Developer Infrastructure: How to Cultivate a Vibrant Community?" "The TV of Tomorrow Show," iTV Today, San Francisco, March 10-11, 2009.

Jim Chambers, **David DiSarro**, **Jackie McKinney**, **Webster Newbold**, **Emily Standridge**, and **Nicole Williams**, Department of English, presented at the Conference on College Composition and Communication, San Francisco, March 10-15, 2009.

David Pierce, School of Physical Education, Sport, and Exercise Science, Sport and Recreation Law Association, San Antonio.

- "Fun, Fantasy and Video Games: The New Intellectual Property Theory."
- "NCAA Student-Athletes' Likenesses, EA Sports and the Video Game Industry: Compromising Amateurism?"

Linda Hanson, Department of English, served as a discussion leader for two sessions at the Conference on College Composition and Communication, San Francisco, March 10-15, 2009.

Kenan Metzger, Department of English, co-author, "Functional and Continuously Responsive: Curriculum and Professional Development in Urban Schools," *Curriculum and Teaching*, Vol. 23, No. 2, 2009.

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