

FINDINGS

OMVC 2010 Consumer Showcase, Washington DC

In January 2010, Harris Interactive (Harris) began working with the Open Mobile Video Coalition (OMVC) to solicit direct consumer feedback on the use, functionality and desirability of Mobile DTV on a variety of devices. Harris facilitated the distribution of beta versions of Mobile DTV-enabled Samsung Moment smartphones, Dell netbooks and LG portable DVD players. Harris gathered qualitative data through a variety of means, including online communities, diaries, survey questionnaires and in-person focus groups. Over 360 individuals in the Washington DC area were exposed to Mobile DTV on a variety of devices and provided firsthand feedback on the benefits and limitations of the technology.

In addition to providing qualitative feedback, participants using the Samsung Moment phone and Dell netbook were automatically uploading their usage data to a centralized server. OMVC partner Rentrak compiled and analyzed the audience data to understand viewership trends and actual numbers of individuals tuned into each channel and program. The qualitative research performed by Harris Interactive was augmented by this analysis. The findings below incorporate both data sources and highlight some of the consumer feedback regarding Mobile DTV

NOTE ON RESEARCH: In reviewing these findings, it is important to remember that qualitative research, by design, is not meant to be projectable within accurate statistical ranges. Rather, these findings offer insight into the thematic and directional information provided by participants. In addition, the data highlighted below is based on the collective results of both survey data and actual data gathered directly from the devices. Please note that data should be considered directional due to low sample size.

Key Findings

Strong Consumer Interest

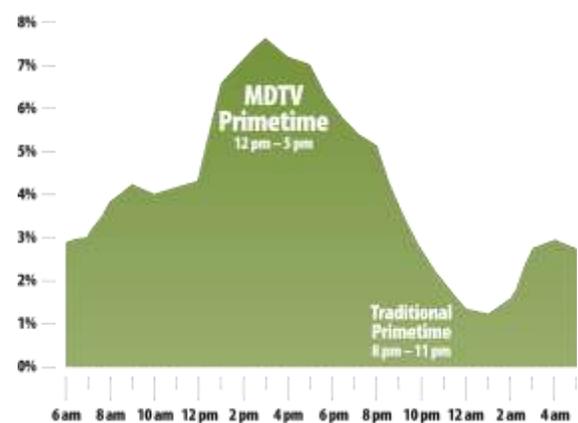
Mobile DTV can be an attractive and competitive service, and can enhance local TV growth prospects by extending the service to new platforms and devices. Trial participants enjoyed being able to watch TV on-the-go and were impressed with Mobile DTV's "HD-like" picture quality. A majority of individuals remained excited about the concept of Mobile DTV throughout the trial and were interested in the prospects of having Mobile DTV available in various devices in the future.

"The picture quality is much better than I expected. I thought maybe it wouldn't refresh fast enough for sports, but I was able to watch World Cup matches on Univision."

Daytime is Primetime

Viewership data gathered and analyzed by Rentrak revealed that the highest level of Mobile DTV viewing occurred during the weekday afternoon. Harris Interactive feedback from the community suggests this viewing is additive and complementary to traditional TV; Mobile DTV expands the number of viewing occasions by allowing consumers to watch TV at locations and times where they would have otherwise

FIGURE 1. Distribution of Viewing by Hour



Rentrak - July 2010 Usage Data

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consumed different media, such as Internet, radio or newspapers. A significant number of trial participants (38%) said their overall TV consumption increased while using Mobile DTV- 94% said it increased or stayed the same.

“The security officers wouldn’t tell us what’s going on so I turned on the news. I turn on the news [and] find out it’s a darn bomb threat. I was stuck in [the] mall. I was like, ‘Are you serious?’ You could see on the news the mall that I work at [and] the street that I cross to go to work!”

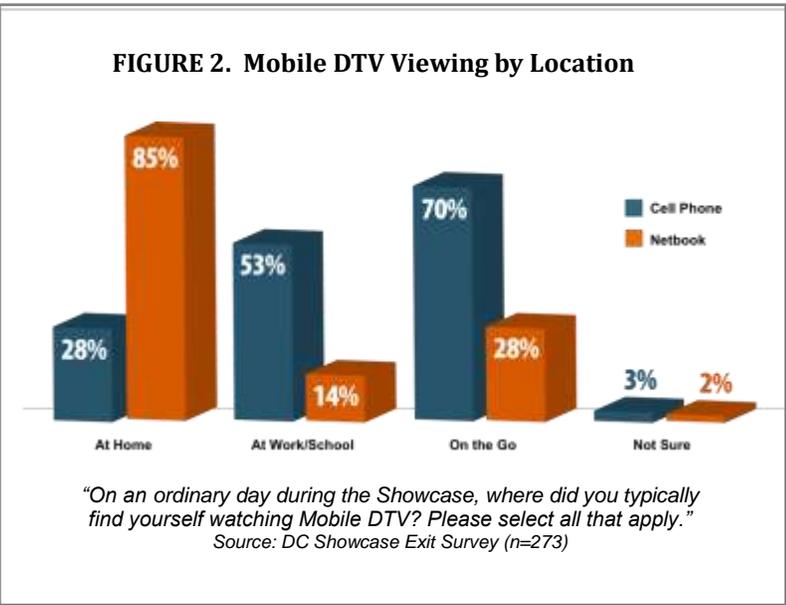
Local Stations Essential, Local News Valued

Participants in the community found themselves tuning into their battery-powered Mobile DTV devices when storms knocked out power to their home TVs or when breaking news unfolded while they were on-the-go. Local news provided depth and coverage beyond what could be found online. Participants appreciate the access to this information resource at a time when they wouldn’t otherwise have had it available.

“[I was] grateful to have something because otherwise [I] would be just trying to read a webpage on [my] phone...it was actually a good chance to have the local broadcast while the power was out.”

Consumers Want Diverse Content

While local news was the most-viewed programming category, participants sought out a diverse mix of content; data from Rentrak showed 30 different genres were viewed during the trial. Many consumers expressed a desire for additional channels, including popular sports and premium movie channels.



Different Use Cases for Different Devices

Cell phone users were more likely to watch outside of the home, especially at work, during their commute, while running errands, and as a way to entertain their kids. Netbook participants used the device primarily in the home as an alternative/backup TV or to provide a TV in other rooms. All devices generated significant interest from parents as another device to entertain children at home, in the car or during idle time waiting.

Conclusions

Consumers perceive Mobile DTV as a discrete content source of local programming similar to what they can see at home. It will be important for the Mobile DTV application to be tightly integrated with other content delivery services, including 3G, 4G and Wi-Fi streaming and video-on-demand, as well as with media storage capabilities on the device (DVR and downloaded). One of the key differentiators of Mobile DTV is that it enables local news and “must-see” entertainment and sports programming to be included in the media “library” on the local device without congesting wireless networks or bankrupting consumers’ data plans.

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Of the devices tested, the Samsung Moment mobile phone elicited the greatest interest due to its portability and the fact that it was “always with you.” Across devices, robust signal coverage and long battery life were considered essential to the Mobile DTV viewing experience and will need to be optimized going forward. The service must be reliable and easy to access, given the “on-the-go” nature of mobile viewing and the importance of live content. The immediate availability of live, local news and information can be a key driver of usage and adoption, providing benefit to both consumers and broadcasters.

After the trial ended, most participants were excited about the prospects of a commercial Mobile DTV service: 60% said they would be at least “somewhat likely” to use Mobile DTV if it remained free, while 49% indicated they would consider subscribing even for a monthly fee.

Uses of Mobile DTV



About the Research

Harris’ Early Adopter Communities (EAC) were built to provide a private online research community comprised of **345** participants located in the Washington DC area.

Samsung Moment Smartphone Community. Beginning May 18th, members of the Washington DC area Sprint Online community were solicited for participation in a new product trial. Of the 181 individuals who met preliminary screening criteria (i.e., home and work locations), 148 met with Harris staff and received an in-person briefing on the Mobile DTV app, and were instructed on how to make the switch over from their current Sprint enabled phone, how to re-sync contacts and other data , as well as how to log onto the Harris online community.

Dell Netbook Community. During the week of June 14th a solicitation and screening survey was sent to Harris Poll panel



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participants in targeted zip codes in the Washington DC area. Over 500 individuals responded to the solicitation and passed the set of screener questions (i.e. home and work locations, propensity to new technology adoption, etc.) These 500 were then contacted to schedule in-person meetings in one of three locations from June 23-25. During the three days, 198 individuals met with Harris staff and received an in-person overview of the Netbook and the Mobile DTV app. At the same time, these individuals received an email invitation to participate in the online community, the feedback platform they would be using over the subsequent four months.

The EAC Community was designed to include weekly questions posed by a Harris moderator, as well as to provide a running “news feed” style of postings that allowed for user generated comments, questions, reactions and feedback. The total participation in the communities across the two devices was robust with over 22,000 comments posted by the participants.

<p>Community Stats</p> <ul style="list-style-type: none">• 345 participants• 123 user-generated discussions• 87 user-generated surveys• 24 different “friends” groups formed• 22,671 comments posted

Other Methods of Data Gathering

Near the conclusion of the online communities, Harris recruited 40 participants to take part in in-person focus groups over two evenings with the intent of both getting additional feedback on the devices they were using, and exposing participants to other Mobile DTV enabled devices such as tablets, phones, netbooks, and central hubs, such as the Tivizen.

Rentrak Corporation provided comprehensive audience analysis, including processing raw usage logs and producing detailed viewership reports. Rentrak’s Mobile TV Essentials™ web-based portal was used to monitor and analyze viewership throughout the trial, allowing OMVC to understand how many participants were using the service, who was watching, how long they were viewing, how frequently they were tuning in and which channels and programs they were watching at different times of the day.

ABOUT HARRIS INTERACTIVE

Harris Interactive is one of the world's leading custom market research firms, leveraging research, technology, and business acumen to transform relevant insight into actionable foresight. Known widely for the Harris Poll and for pioneering innovative research methodologies, Harris offers expertise in a wide range of industries including healthcare, technology, public affairs, energy, telecommunications, financial services, insurance, media, retail, restaurant, and consumer package goods. Serving clients in over 215 countries and territories through our North American, European, and Asian offices and a network of independent market research firms, Harris specializes in delivering research solutions that help us - and our clients - stay ahead of what's next. For more information, please visit www.harrisinteractive.com.