

### 3 Screens : TV, 인터넷, 모바일

- 미국 시청자들의 영상 시청률은 지속적인 상승률을 보이고 있으며 텔레비전, 인터넷, 모바일 등의 플랫폼으로 영상을 시청하고 있음
- 특히 인터넷과 모바일 영상물 시청률이 크게 상승하고 있으며 모바일 시청자는 작년 대비 70%, 온라인 시청자는 46% 상승하였음
- 온라인과 모바일 이용자가 증가하고 있지만 텔레비전 시청률 또한 상승하고 있음 (2009년 2분기: 평균 141시간/1개월)

※ 2009년 2/4분기 월별 영상물 시청 시간 (연령대별)

Table 1

Overall Usage Number of Users 2+ (in 000's) – Monthly Reach				
	2Q09	1Q09	2Q08	% Diff Yr to Yr
Watching TV in the home <sup>o</sup>	284,396	284,574	281,746	0.9%
Watching Timeshifted TV <sup>o</sup>	82,297	79,533	62,240	32.2%
Using the Internet <sup>**</sup>	191,035	163,110	159,986	19.4%
Watching Video on Internet <sup>**</sup>	133,962	131,102	119,164	12.4%
Using a Mobile Phone <sup>^</sup>	233,722	230,436	221,651	0.5%
Mobile Subscribers Watching Video on a Mobile Phone <sup>^</sup>	15,267	13,419	9,004	70.0%

Source: The Nielsen Company

Table 2

Monthly Time Spent in Hours:Minutes Per User 2+					
	2Q09	1Q09	2Q08	% Diff Yr to Yr (2Q09 to 2Q08)	Absolute Diff Yr to Yr (2Q09 to 2Q08)
Watching TV in the home*	141:03	153:27	139:00	1.5%	2:02
Watching Timeshifted TV*	7:16	8:13	6:05	19.5%	1:11
Using the Internet**	26:15	29:15	26:29	-0.9%	0:14
Watching Video on Internet**	3:11	3:00	2:12	45.5%	0:59
Mobile Subscribers Watching Video on a Mobile Phone <sup>^</sup>	3:15	3:37	3:37	-10.0%	0:22

Source: The Nielsen Company

Editor's Note: TV viewing patterns in the U.S. tend to be seasonal, with TV usage higher in the winter months and lower in the summer months leading to a decline in quarter to quarter usage, yet increasing from 2Q08 to 2Q09.

**How to Read Table 2:**

As of 2Q09 the 290 million people in the U.S. with TVs spend on average 141 hours: 3 minutes each month tuning into television. June 2009 data (used in this report in place of 2Q09) shows that 134 million people watching video on the Internet spent on average 3 hours:11 minutes during the month doing so. As of 2Q09 the 15 million people subscribing to mobile video in the U.S. spend on average 3 hrs:15 minutes each month watching video on a mobile phone.

Table 3

Monthly Time Spent in Hours:Minutes 2Q 2009								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On Traditional TV*	101:51	101:09	108:49	131:11	136:38	156:59	178:34	197:44
Watching Timeshifted TV*	5:26	4:54	5:33	10:22	9:59	8:19	8:05	3:56
Using the Internet**	4:44	10:22	26:09	34:00	33:05	30:35	26:55	21:57
Watching Video on Internet**	1:48	2:41	5:11	4:42	3:27	3:00	1:56	1:13
Mobile Subscribers Watching Video on a Mobile Phone <sup>^</sup>	n/a <sup>^^</sup>	6:30 <sup>^^</sup>	3:15	2:10	2:53	2:10	2:10	n/a <sup>oo</sup>

Source: The Nielsen Company

- 미국 시청자들은 영상물 상영을 위해 기존의 텔레비전을 교체하기 보다 새로운 미디어 플랫폼을 추가로 이용하고 있는 것으로 보임
- 인터넷 서비스를 제공받고 있는 미국 가정 중 57%이 적어도 한달에 한번은 텔레비전과 인터넷을 동시에 사용하고 있다고 밝혀짐
- 텔레비전과 인터넷 동시 사용 (simultaneous activity)이 인터넷과 TV 판매가 증가하고 있는 이유 중 하나임
- 인터넷 서비스를 제공받고 있는 미국 가정 중 57%이 적어도 한달

Table 4

Video Audience Composition – Age 2Q 2009								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On TV*	10%	6%	8%	12%	14%	17%	15%	18%
On the Internet**	6%	8%	9%	15%	19%	21%	13%	9%
On Mobile Phones <sup>^</sup>	n/a <sup>^^</sup>	19% <sup>^^</sup>	12%	32%	20%	11%	5%	1%

Source: The Nielsen Company

Table 5

Video Audience Composition – Gender 1Q 2009		
	F2+	M2+
On TV*	54%	46%
On the Internet**	54%	46%
On Mobile Phones <sup>^^</sup>	41%	59%

Source: The Nielsen Company

에 한번은 텔레비전 시청과 인터넷 이용을 동시하고 있음

- 이같은 소비자들은 평균 한달에 2시간 39분동안 인터넷을 사용하며 TV를 시청하는 것을 나타냄

Table 6

Persons 2+ Watching TV and Using the Internet Simultaneously At Least Once Per Month — June 2009 <sup>ooo</sup>	
	P2+
% of Persons Using TV/Internet Simultaneously	56.9%
Estimated Number of Persons Using TV/Internet Simultaneously (000)	128,047
Time Spent Simultaneously Using TV/Internet Per Person in Hours:Minutes	2:39
Average % of TV time Panelists spent also using the Internet	2.7%
Average % of Internet time Panelists spent also using TV	27.9%

Source: The Nielsen Company

## □ Key Facts

- 미국인들의 TV시청률은 상승하고 있으며 텔레비전 소유 수치 또한 상승하고 있음
- 현재 54% 이상의 미국인들이 3대 이상의 TV를 소유하고 있음
- 작년 대비 인터넷 사용률은 큰 변화가 없었지만 온라인 영상물 시청률은 급상승하고 있음
- 특히 18-24세 그룹의 월별 평균 온라인 비디오 시청시간은 5시간으로 65세 이상의 1시간에 비해 현저히 높은
- 온라인 영상물 중 83%는 유튜브 클립과 같은 짧은 비디오 (short form video) 이었으며 모바일로 시청된 영상물중의 대부분은 방송국/스튜디오에서 내어놓은 영상물이었음

- 많은 미국인들은 TV와 인터넷을 동시에 사용하는 Multi-task 스타일로 즐기고 있음. 28%의 인터넷 사용자는 인터넷을 사용하며 TV를 보며 3%의 TV시청자는 TV를 시청하며 인터넷을 사용함
- 시간변동형 TV (Timeshifted television) 사용률이 지속적으로 증가할 것으로 전망
- 월별 2/4분기 시간변동형 TV 이용시간은 2008년 6시간5분에서 2009년에는 7시간 16분으로 한시간 이상 증가하였음
- 현재 30% 의 미국 가정이 DVR 장치를 소유하고 있으며 이 숫자를 증가 할 것임
- 2009년 2/4분기에는 작년 대비 70% 상승한 1,500만명의 소비자가 모바일 비디오를 사용하였으며 이용도는 계속 증가 할 것임

FOOTNOTES FOR CHARTS ABOVE:

- ° TV in the Home includes those viewing at least one minute (reach) within the measurement period. This includes Live viewing plus any playback within the measurement period; Timeshifted TV is playback primarily on a DVR but including playback on services like Start Over as well as playback from a DVD recorder or VOD.
- \* TV in the Home includes Live usage plus any playback viewing within the measurement period. Timeshifted TV is playback primarily on a DVR but including playback services like Start Over as well as playback from a DVD recorder or VOD.
- \*\* Internet figures are from home and work. Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are monthly averages over the course of the quarter. Due to enhancements to Nielsen NetView and Nielsen VideoCensus, Q2 2009 figures are based on June 09 monthly metrics only. Trending of previously-reported data with current results may show percentage differences attributable to these product enhancements and should only be compared directionally. Quarterly averages will resume with Q3 2009.
- ^ The average monthly unique users of mobile phones and mobile video in 2Q 2008, 1Q 2009 and 2Q 2009, projected based on Nielsen TPG surveys, Nielsen TPG Flowshare and CTIA projections of U.S. wireless subscriptions. Video user projection, time spent and composition data based on survey analysis of past 30 day use during the period. The mobile video audience figures in this report include mobile phone users who access mobile video through any means (including mobile Web, subscription-based, downloads and applications). Projection of all subscribers is based on persons 2+. Projection of mobile video viewers, and all other mobile video estimates, based on subscribers 13+.
- ^^ Nielsen Mobile's survey reports mobile video usage for those users 13 and older. Thus, 12-17 is T13-17 for all mobile data.
- ^^ A65+ base size too small to report mobile video hours:minutes
- °°° Figures are from Nielsen's TV/Internet Convergence Panel, a sample of 1000 homes and approximately 2800 people (ages 2+) where both TV and Internet are electronically measured. PCs owned by the household are measured, including laptops. PCs owned by an employer are NOT included. The panel is primarily comprised of Forced Turnover Households (FTO) from Nielsen's National TV panel and is therefore not a probability sample or projectable to the total U.S. population. NOTE: Simultaneous users are those that simultaneously used the TV and the Internet for at least one minute during the month. TV in the Home includes those viewing at least one minute (reach) within the measurement period. This includes Live viewing plus any playback within the measurement period; Timeshifted TV is playback primarily on a DVR but including playback on services like Start Over as well as playback from a DVD recorder or VOD. Simultaneous Users are weighted to the sum of weights of Internet homes in Nielsen's National TV sample. Weighting has not been applied to the other statistics. June 2009 is 6/1/09 - 6/28/09.

※ 이 심층 리포트는 미국 내 마케팅 정보, 미디어 측정 및 정보, 그리고 비즈니스 미디어 리서치 전문 기관 중 가장 큰 회사 중 하나인 *The Nielsen Company* 의 2009년 2/4분기 A2/M2 리포트를 토대로 작성하였음