



Lifestyles,
Attitudes &
Video
Consumption
of Today's
Broadband
Consumers

A New Multi-Client Study by Horowitz Associates, Inc.

About the Study:

The most essential research on broadband and broadband video today has to do with *the connections* between the people, the technology and the competing media brands in this emerging space. Broadband technologies, and the alternative and portable media platforms enabled by broadband, are growing in consumer acceptance and usage— with important implications for media companies, content developers and advertisers.

What are consumers' attitudes towards and actual consumption of broadband-enabled and cross-platform content and services, particularly as they relate to attitudes towards and consumption of your media brands?

This cutting-edge research endeavor will uncover key learnings about today's broadband consumers, who will be surveyed, and then ***segmented and analyzed by their Broadband lifestyles***, marrying:

- **Broadband technology ownership, usage and content viewing;**
- **Socio-economic level, lifestyle, ethnic and other demographics;**
- **Television and Internet content preferences;**
- **Relationships to major media brands;**
- **... and other attitudinal information**

...to create tangible and workable **Broadband Lifestyle Segments***.

* * "Making Connections: Consumer Broadband Lifestyles" logo/ title, Segmentation titles and Broadband Lifestyles name and concept are the intellectual property of Horowitz Associates and cannot be used without permission.

You will obtain unique, benchmark intelligence on these core **Broadband Lifestyle Segments**:

- **The Mavens and Mavericks:** Young adults whose lifestyles center around communicating with friends and family, taking and viewing photos, downloading and listening to music, browsing the Internet, and viewing/creating user-generated content. They like and aspire to have the latest technology gadgets, as much for status symbols as for the technology they offer. A variety of video and other content is consumed on portable technology. For this group, it's all about staying connected and being "hip."
- **The Broadband Workforce:** Twenty-something and beyond broadband users who have entered the workforce armed with technology, tools, knowledge and access to information. They rely on their broadband devices not only to keep up with their social lives but also to stay ahead of the game work-wise (news, stock market, email, etc.) even while they are not at work.
- **The Connected Multiculturals: Hip, Urban Young Adults:** These tech-savvy young Latinos, Blacks and Asians and Whites are always connected to friends and family via cell phones, text messaging and IM. They are heavy users of portable devices like iPods and PSPs. Broadband video and games are rapidly becoming part of their everyday media consumption. These multicultural young people are very into exploring and redefining their identities that include and embrace their American and ethnic influences. They are at once culturally and digitally fluent: They enjoy socializing, going out, consuming and participating in popular culture; they enjoy strong ties to their families and communities.
- **The Web Moms:** In these homes and among women, broadband services and technology represent convenience, connections, education and entertainment. Broadband and portable technologies are not just tools; they are part of the family's lifestyle. Broadband is essential to keeping organized and keeping connected, so features like text messaging, checking email on portable devices and using the cell phone are invaluable assets for their busy lives.
- **The Sports-Gotta Have It:** These are TV sports fans – men – who consume and keep up with their sports, teams and colleagues at all times and on all devices. It is news, highlights and information, not events. They are very information and communication oriented, not that tech oriented.
- **The Non-tech Utilitarians**

Methodology:

To address the full complexity of this research endeavor, and to provide the most groundbreaking intelligence on this market, *this multi-faceted research program includes three distinct methodological approaches:*

➤ A Quantitative (Online) Survey of Broadband Users:

- 2,200 online surveys conducted nationally among consumers 16+;
- 1,000 general market interviews, plus quotas by ethnicity of 400 Hispanic, 400 Black/African-American, and 400 Asian broadband consumers to provide analysis by ethnicity;
- Broadband users– who have broadband access to the Internet at home, work or school on a regular basis;
- Consumers with the following devices will be included in the sample: HDTVs, DVRs, video-enabled cell-phones, video iPods/MP3s, Blackberries, PSPs, PMPs.

➤ Broadband Lifestyles Segmentation Analysis of survey data including:

- Content preferences and viewing;
- Technology ownership, usage and penetration profiles;
- Major media brand affinities;
- Lifestyle and attitudinal insights;
- Demographic profiles, including analysis by ethnic group;
- And more.

➤ A Qualitative Videography of Broadband Lifestyles Segments:

- Visual examples of what consumers in some of these segments actually do with their broadband devices and content, not just what they say about it!

Deliverables:

- Input on the survey questionnaire for charter subscribers;
- The detailed data tabulations from primary research and segmentation of broadband consumers;
- A written, interpretative management report with charts and graphs;
- A topline Power Point of the findings;
- A DVD of the videography.

Schedule:

- Survey Data Collection: October/November 2006.
- Segmentation and Videography: January/February, 2007.
- Report: March, 2007.

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