

Connected Kids

Trends in Youth Gaming

ARF Youth Council
August 21, 2007

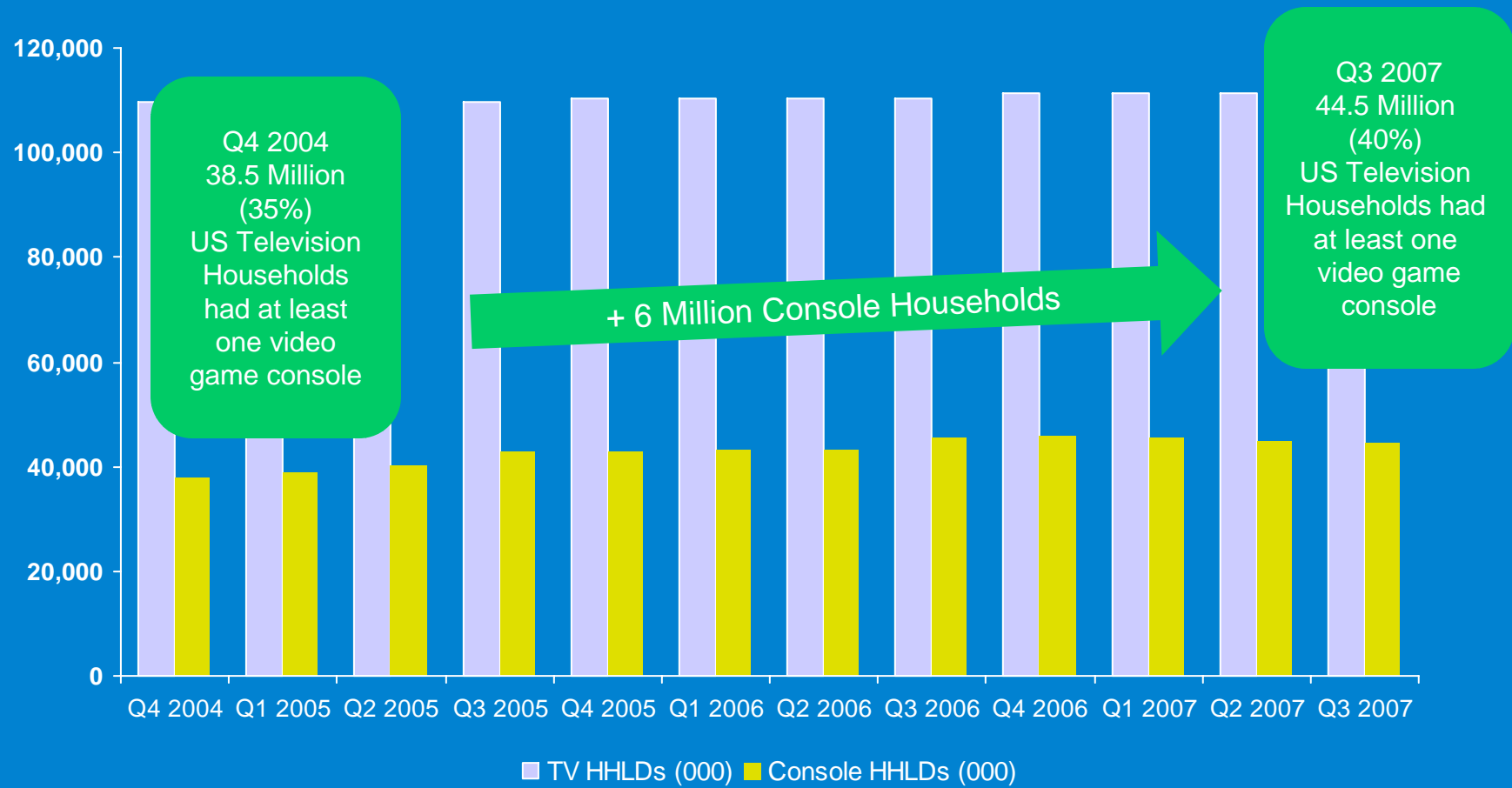


Methodology

- Electronic metering of console usage in Nielsen's national sample of TV households (>30,000 persons)
 - Nielsen's People Meter detects Video Game console as a unique viewing source, monitoring when it is in use and who is using it
- All console models are monitored (from original Nintendo NES to PLAYSTATION 3)
- All console usage is included

Console Universe Growth Continues

15.5% Growth in Console Households Since Q4 2004



Source: Nielsen Media Research – National People Meter Sample

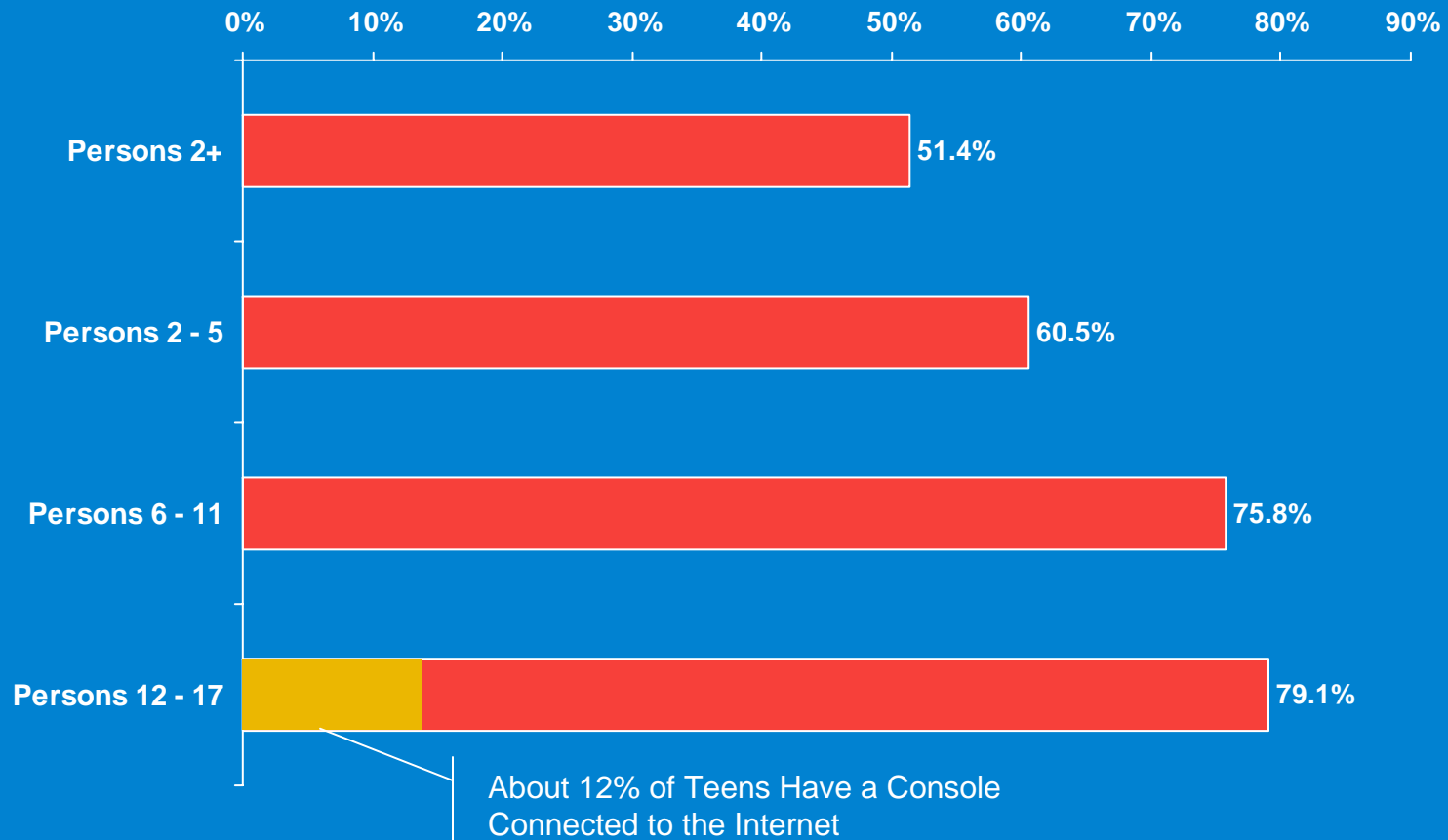
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Four out of Five Teens Have a Video Game Console In Their Home

Console Penetration Among Youth - July 2007

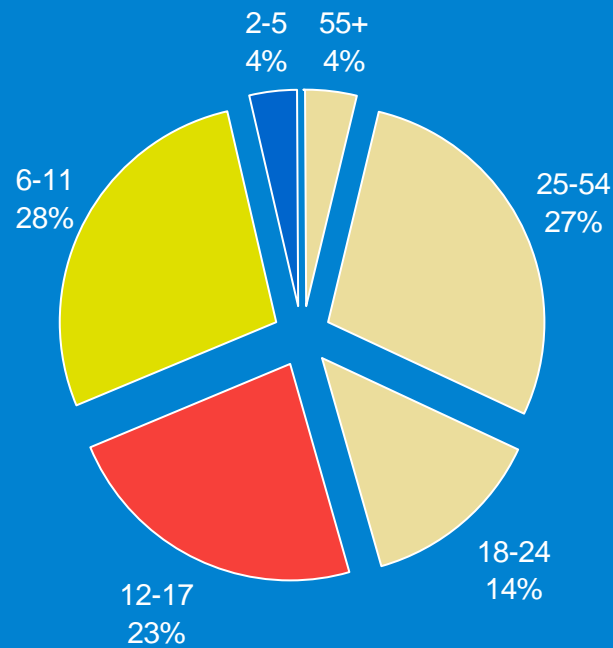


Source: Nielsen Media Research – National People Meter Sample

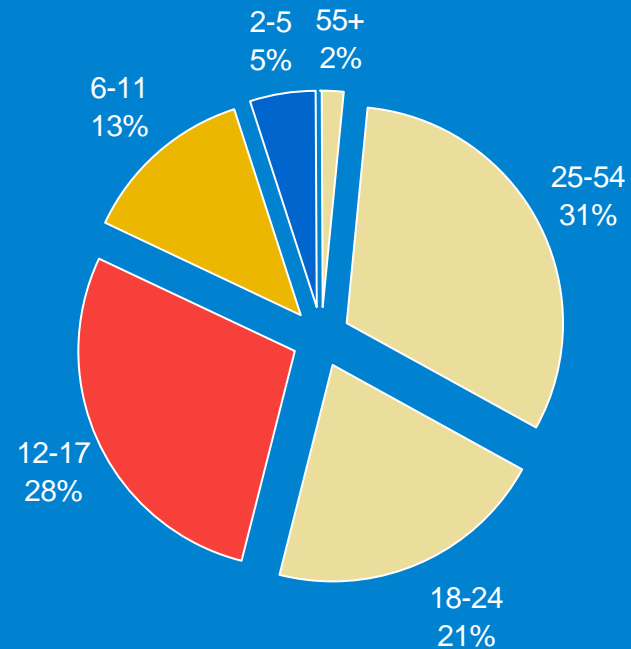
Audience Compositions Differ by Console

Nintendo's Wii Over-indexes on kids 6-11

Wii Aud. Composition - June 2007



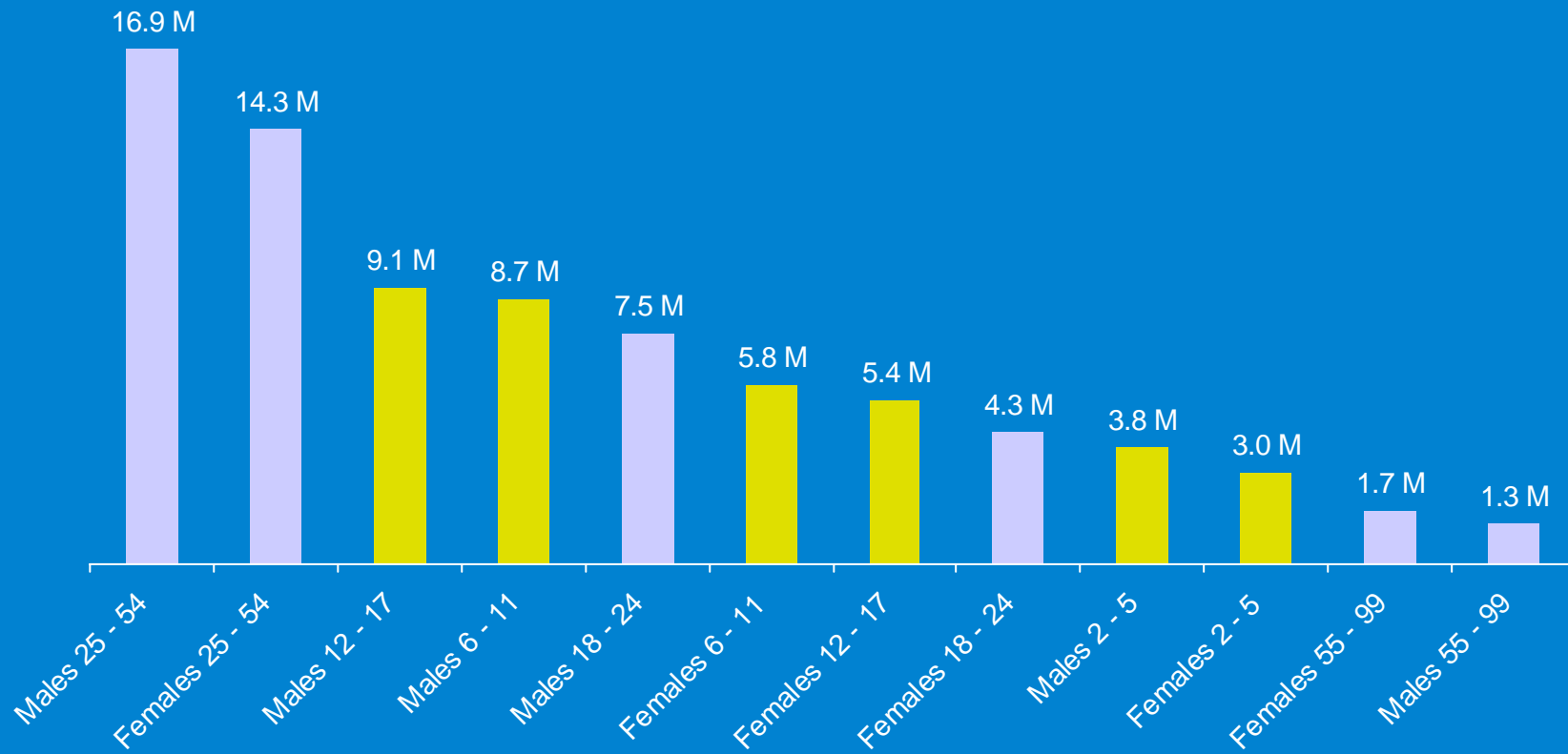
Xbox 360 Aud. Composition - June 2007



82.3 Million Console Users Last Quarter

More than 9 million teenage boys, 5 million teenage girls

Unduplicated Console Reach - Q2 2007 (6 min.)



Source: Nielsen Media Research – National People Meter Sample

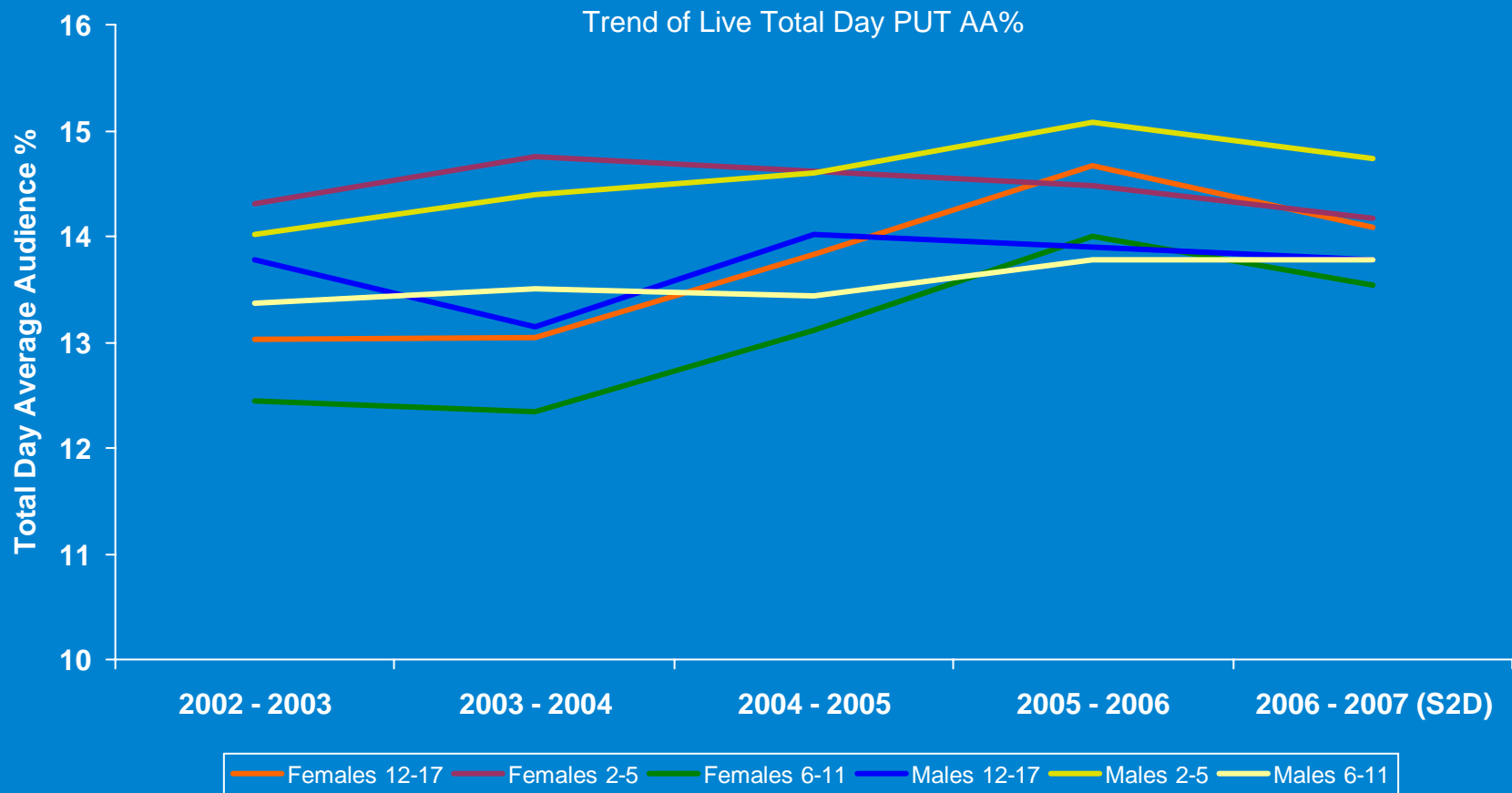
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Youth TV Viewing Remains Fairly Steady

Viewing Among Some Demos Even On the Rise



Source: Nielsen Media Research – National People Meter Sample

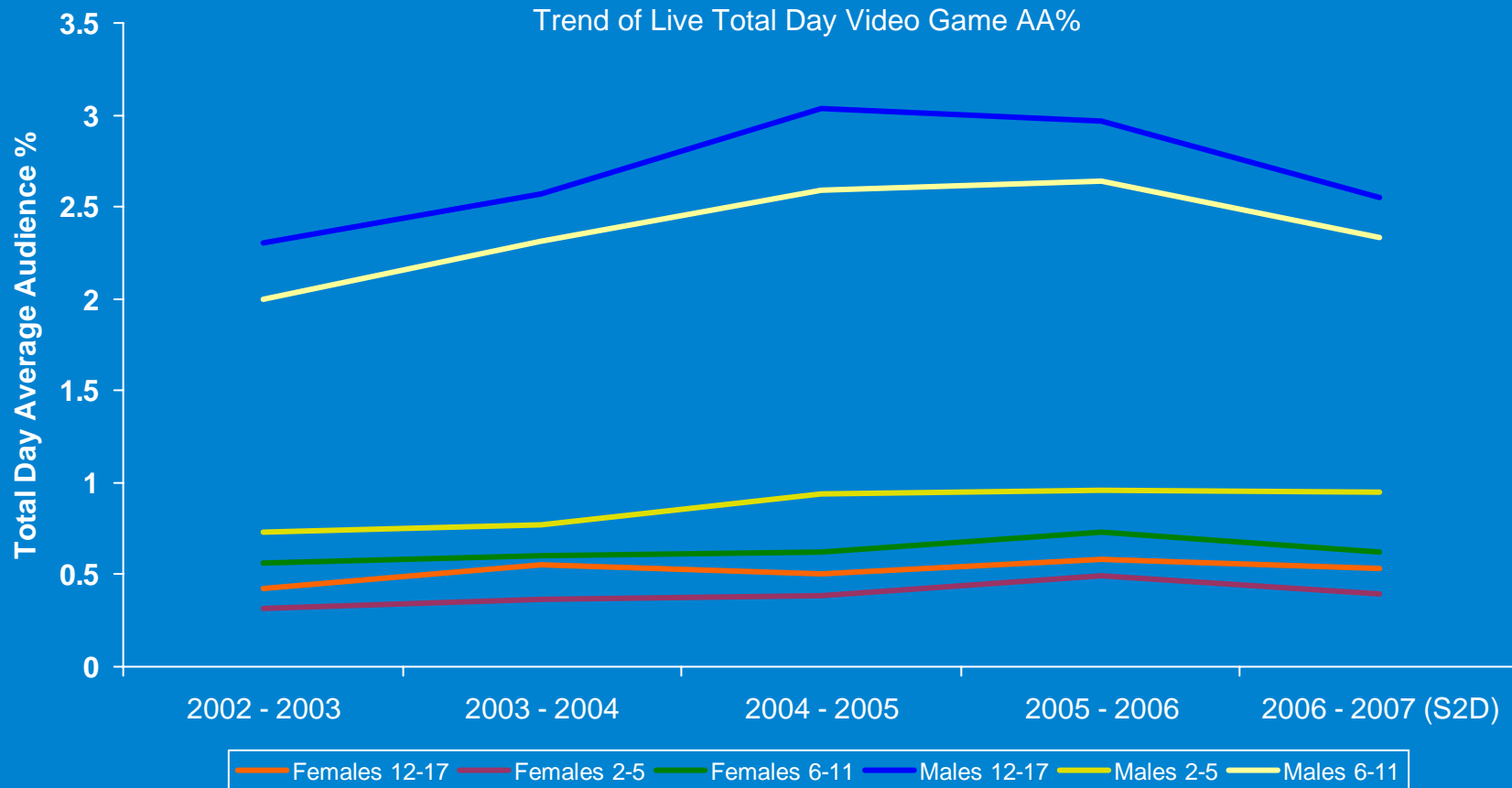
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Youth Gaming Saw Slight Decline in 2005-2006

Next-Gen Consoles May Increase Activity



Source: Nielsen Media Research – National People Meter Sample

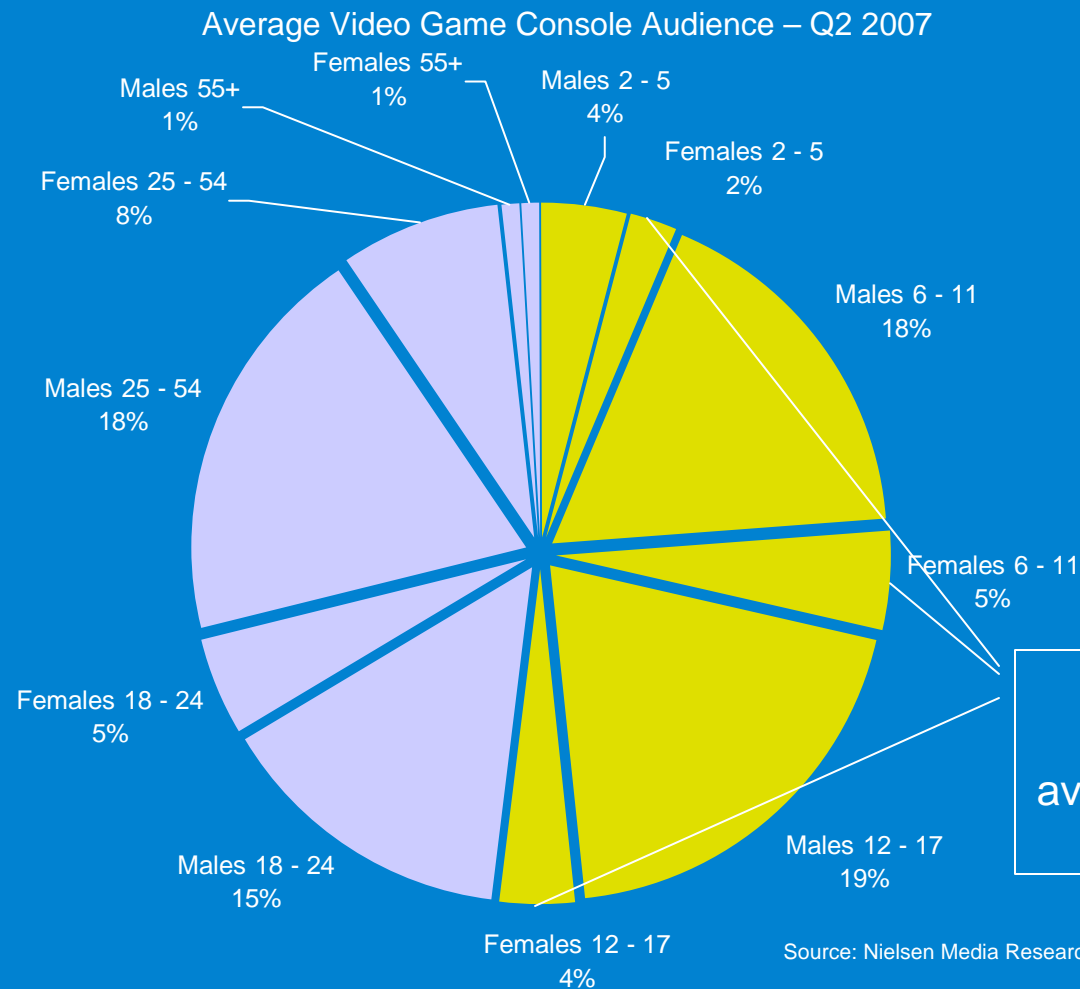
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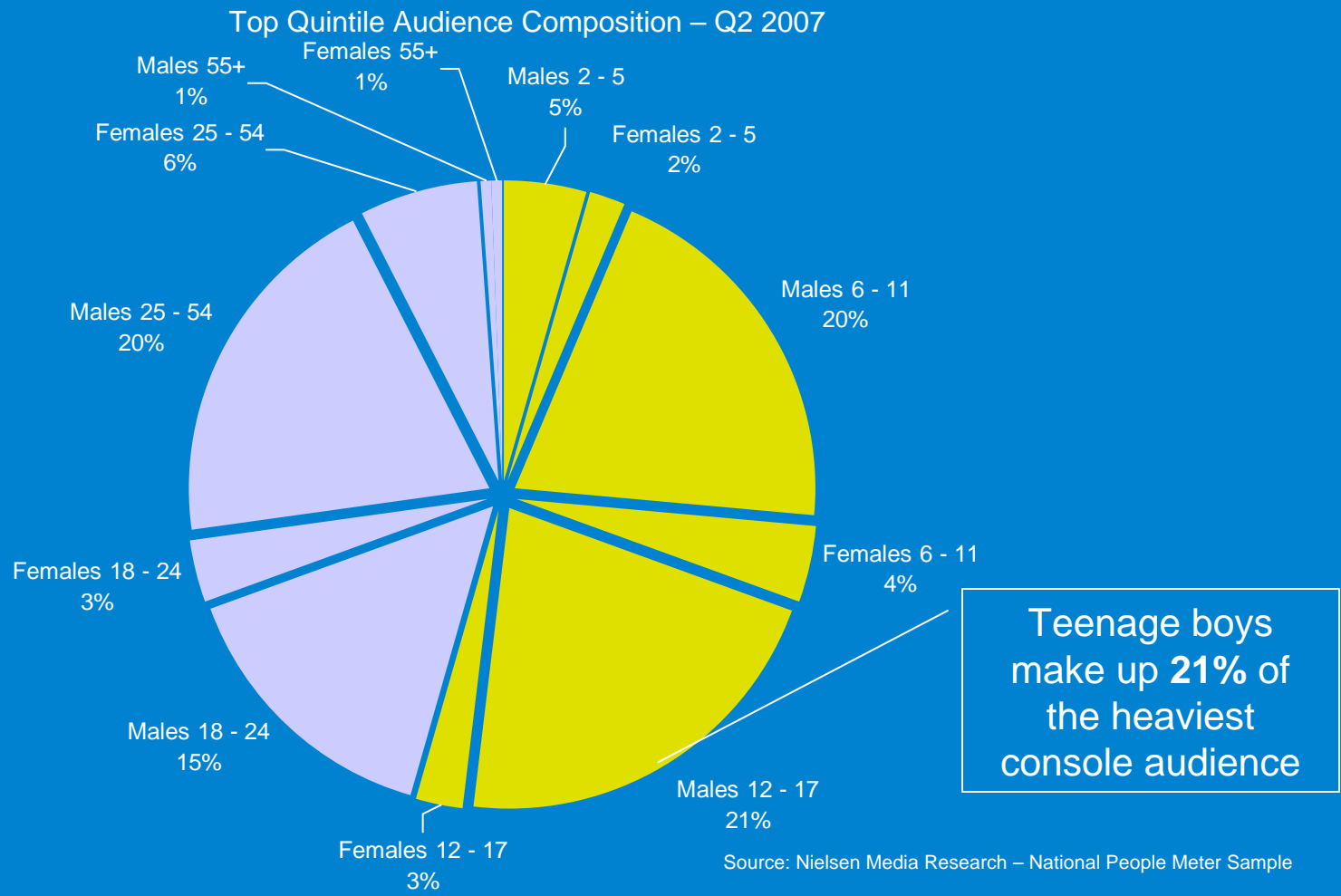
About Half of Console Users are 17 or Younger

Teenage boys make up the largest slice of users



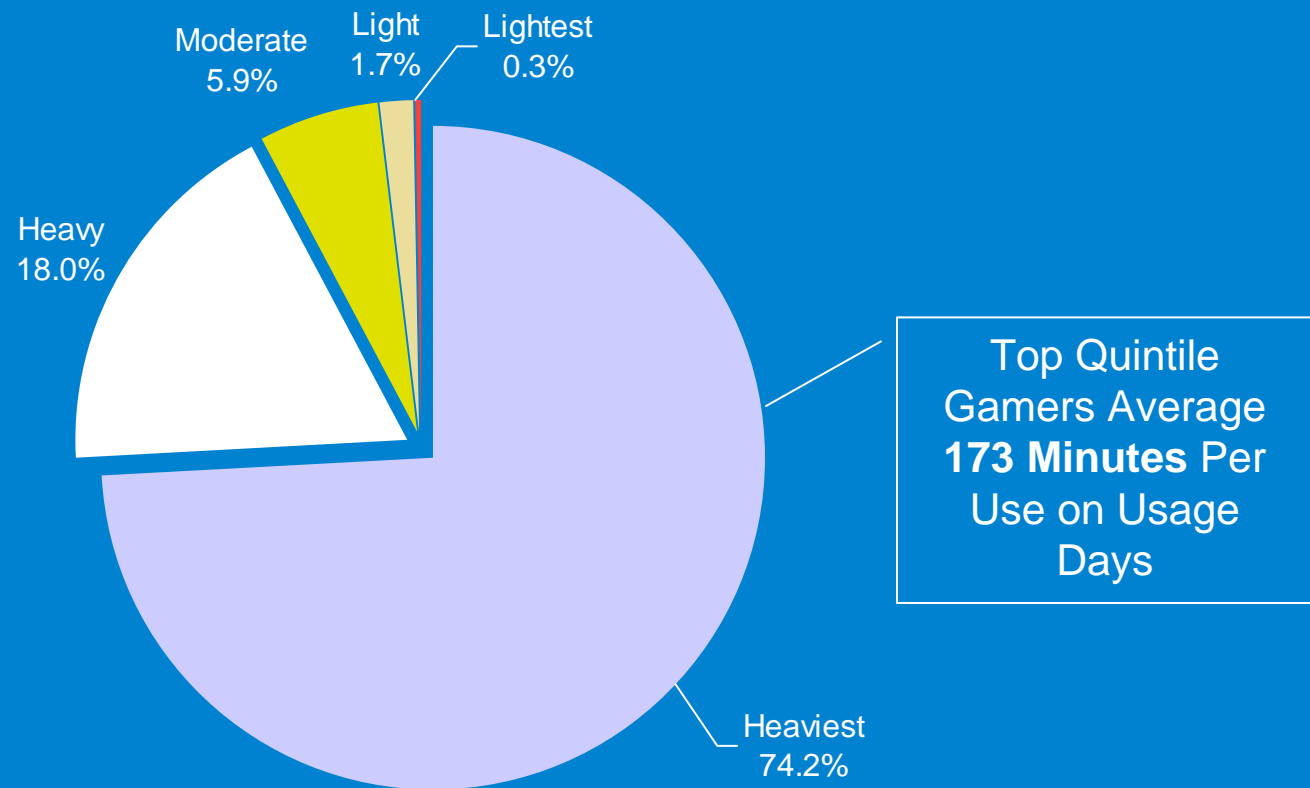
Source: Nielsen Media Research – National People Meter Sample

The Heaviest Console Audience Is Very Similar to the Average Audience in Terms of Age/Gender



The Heaviest Console Users Account for Three-Quarters of All Console Use

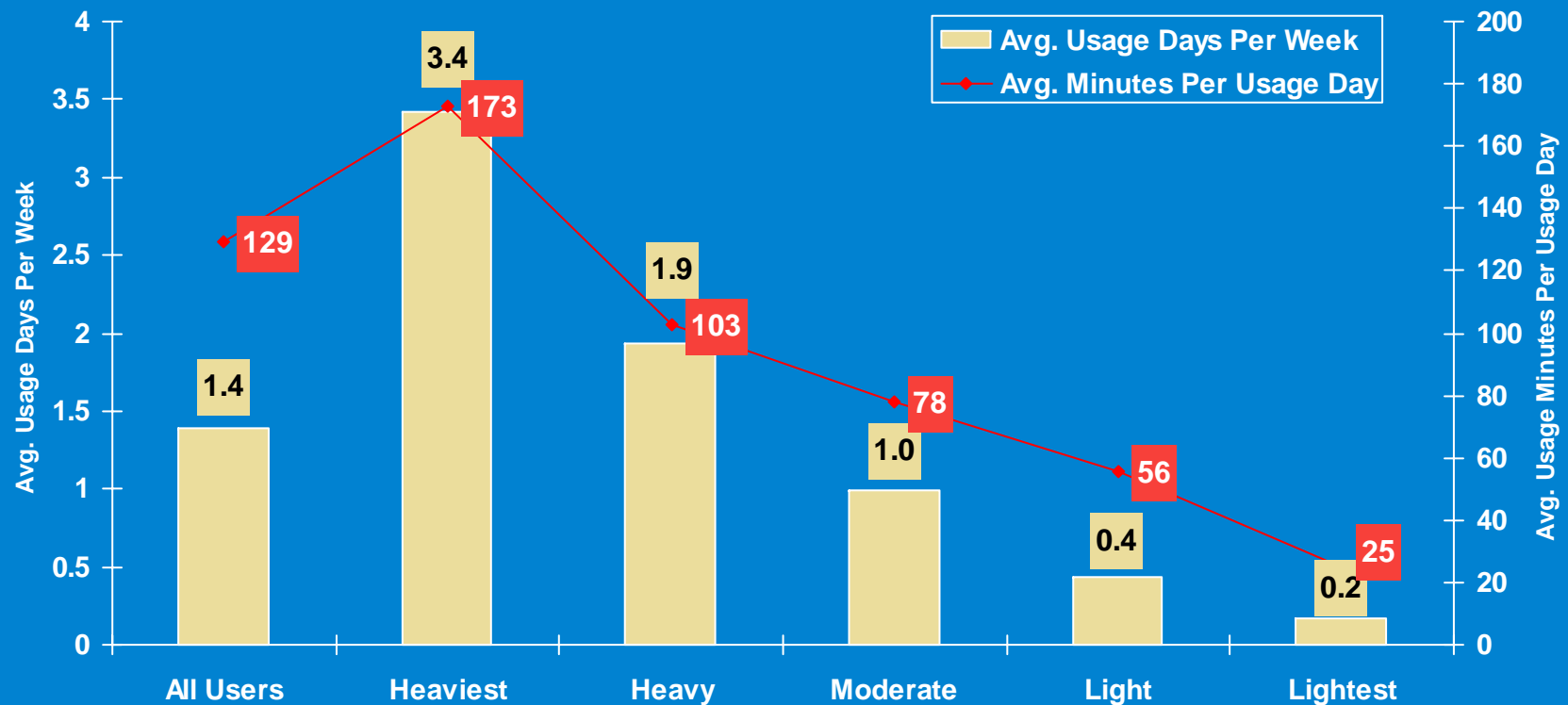
Video Game Audience Quintiles – Q2 2007



Source: Nielsen Media Research – National People Meter Sample

The Heaviest Youth Gamers Use Consoles More Than 3 Times a Week for Nearly 3 Hrs Each Day

Avg. Usage Days and Minutes by Youth (2-17) Quintiles of Use - Q2 2007



Source: Nielsen Media Research – National People Meter Sample

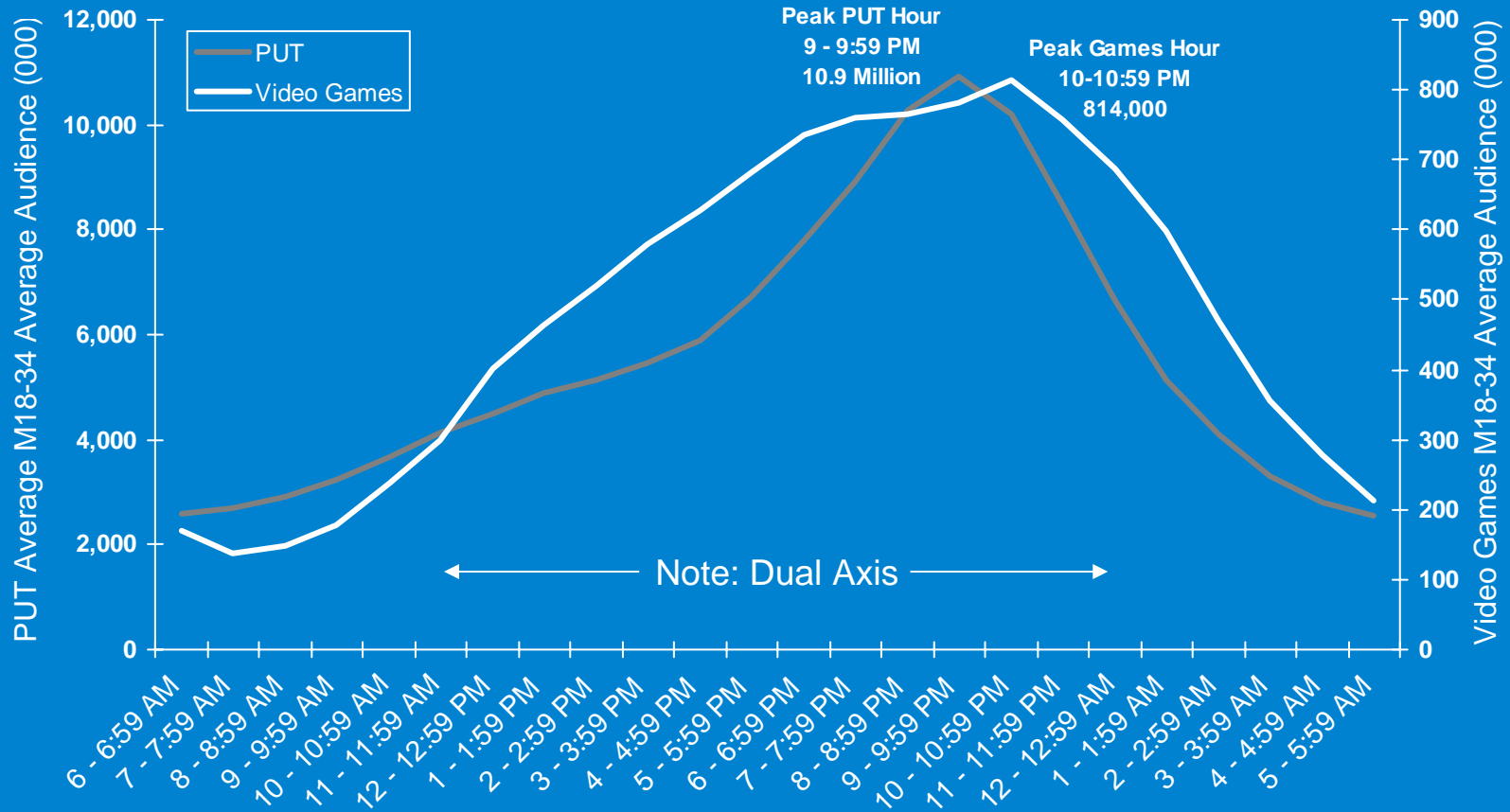
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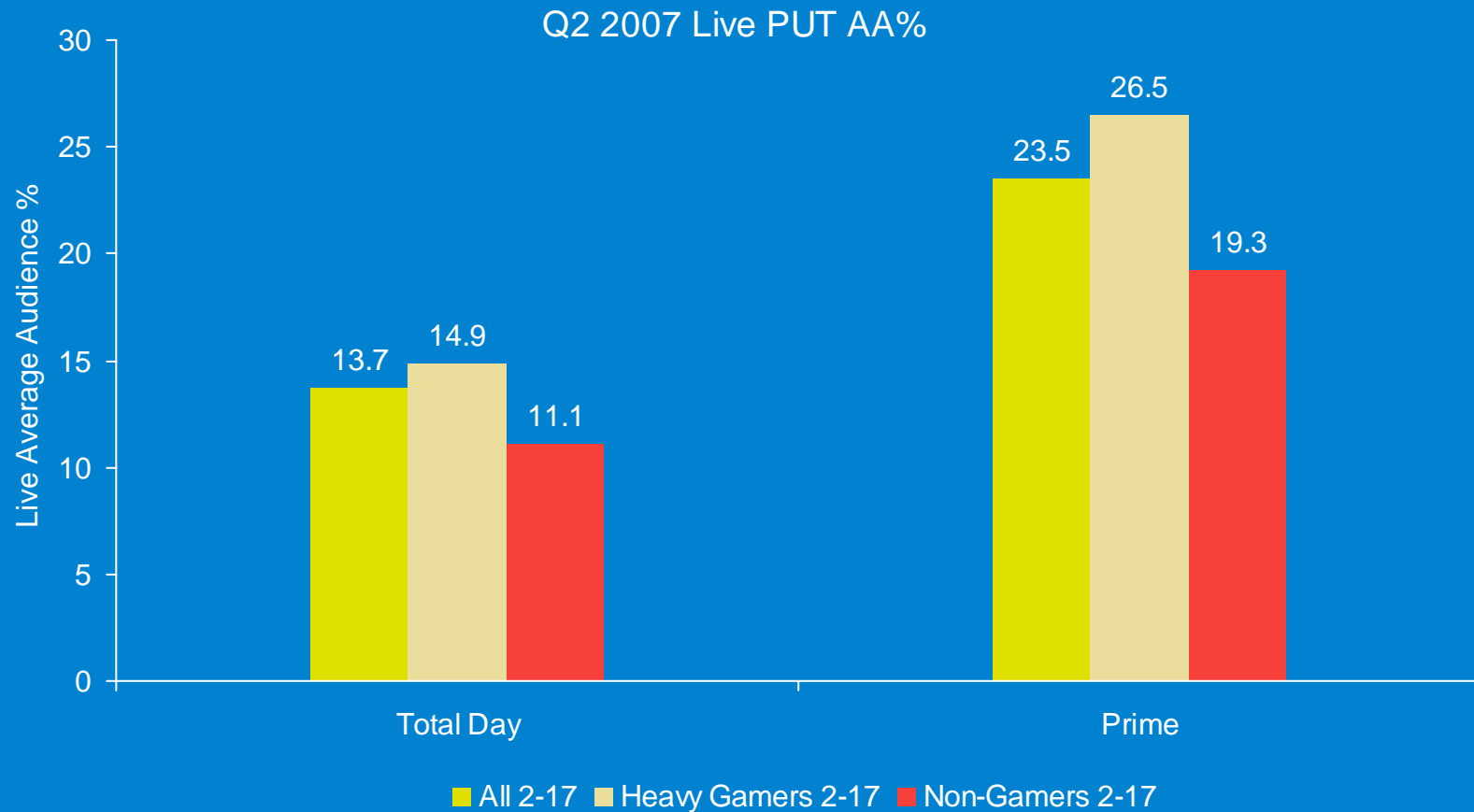
Console Time of Day Mirrors TV, in Large Part

Average M 18-34 Audience by Hour
Video Game Console and PUT Viewing Sources, February 2007



Source: Nielsen Media Research's NPM. Average audiences (000) by hour, 2/1/07-2/28/07

Active Young Gamers Actually Watch *More* TV Than Their Non-Gaming Peers



Source: Nielsen Media Research – National People Meter Sample

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FOX's *Family Guy* Was the Most Popular Prime Time Program Among Top Gamers in Q2 2007

| Program | Net | Tel # | Live AA% |
|---------------------------|------------|----------|------------|
| Family Guy | FOX | 4 | 6.0 |
| American Idol – Tuesday | FOX | 8 | 5.8 |
| American Idol – Wednesday | FOX | 8 | 5.8 |
| Spy Kids 3: Game Over | DIS | 1 | 5.5 |
| Simpsons | FOX | 5 | 5.4 |
| Pokemon: Diamond & Pearl | TOON | 1 | 5.2 |
| Naruto | TOON | 26 | 4.9 |
| Spongebob The Movie | NICK | 1 | 4.9 |
| American Dad | FOX | 4 | 4.8 |
| Holes | DIS | 2 | 4.6 |

Source: Nielsen Games analysis of NPM.
Live viewing only. Excludes repeats, specials and telecasts <5 min.

New Services from Nielsen Games

- **GamePlay Metrics™**
 - Title-level PC and Console Video Game Usage Data
- **GameViews™**
 - Insights on the demographics and TV viewing behavior of video gamers by quintile segmentations and console make/model ownership

Key Takeaways

- Penetration of video game consoles continues to increase
- Kids aren't necessarily gaming *more*, but they are gaming *differently*
- About half of the console audience is under the age of 17
- The top kid gamers game about every other day, for nearly 3 hours on those days they game
- Gaming hasn't taken away from TV viewing as much as some would lead you to believe

Thank You

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