

# Time-Shifting

Digital Video Recorders



# DVR Measurement

## NATIONAL

**Prior to 2006, homes with PVRs/DVRs were excluded from the sample.**

**Nielsen started to measure time-shifted viewing 12/26/05 from PVRs/DVRs in its local and national syndicated services utilizing an A/P meter.**

## LOCAL

**Starting May 2005, 8-day diaries were sent to DVR HHs in all set meter & diary markets.**

# Streams Of Viewing

## NATIONAL SAMPLE

3 STREAMS

Live	Live viewing only (excludes DVR playback)
Live + Same Day	Live viewing plus same day DVR playback (up to 3am)
Live + 7	Live viewing plus 7 days of DVR playback

## LOCAL SAMPLE

2 STREAMS

Live	Live viewing only (excludes DVR playback)
Live + 7	Live viewing plus 7 days of DVR playback

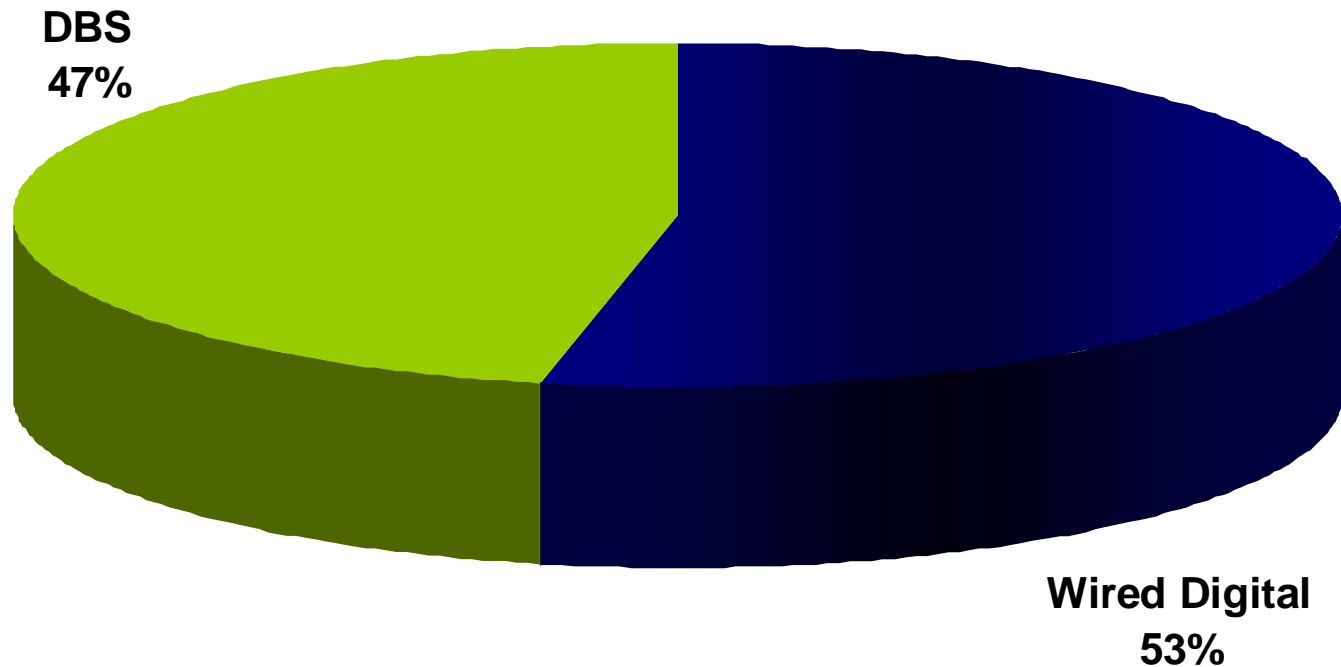
Live & Live + SD delivered on a daily basis.

Live + 7 delivered two weeks following completion of each  
Monday-Sunday week.



# With DVR Penetration At 20%, Cable Systems Account for 53% of All The DVRs

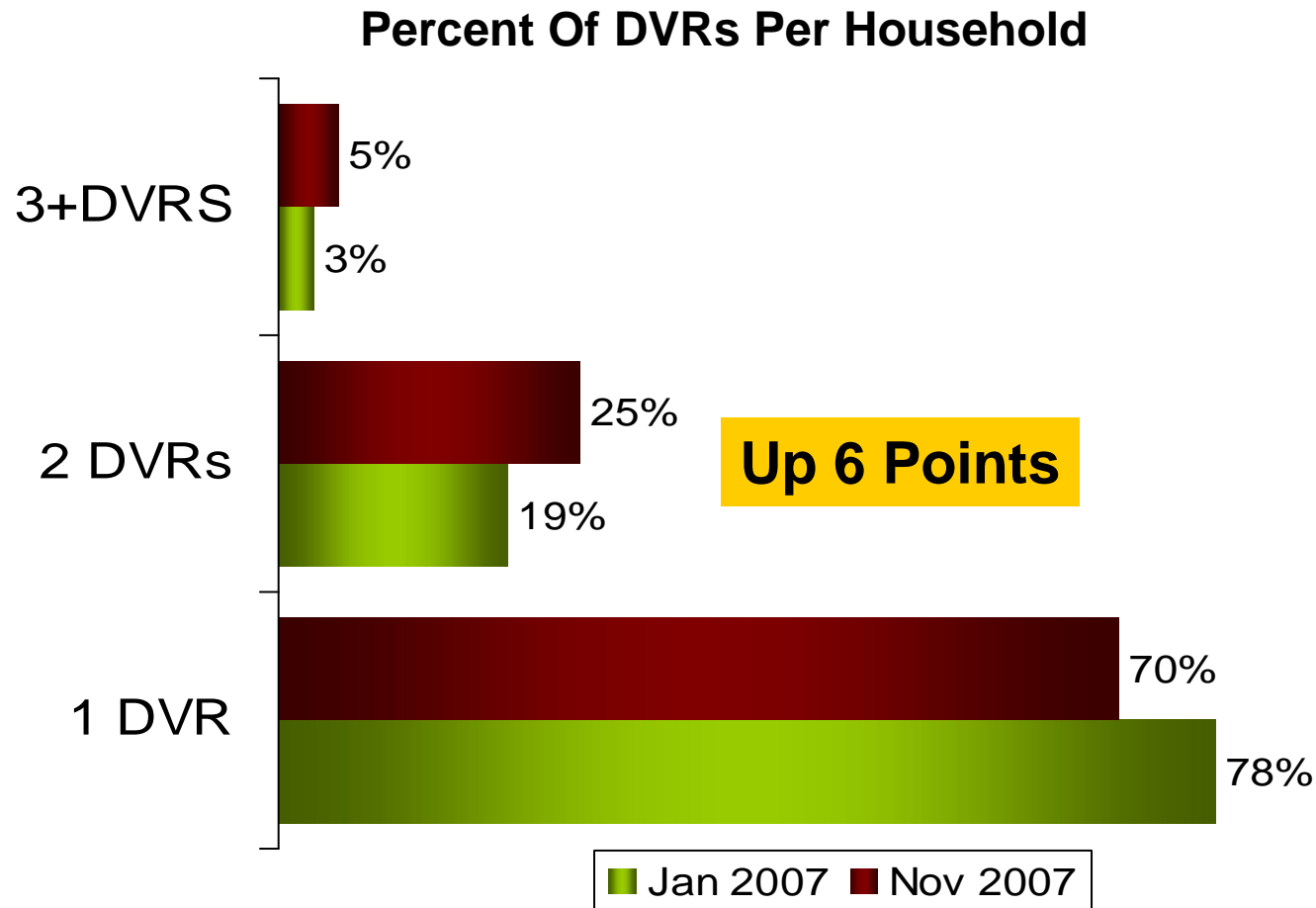
DVR Install Composition



Source: Nielsen, 11/07. Based on Scaled Installed counts.



# Households Are Becoming Increasingly Multi-DVR Homes – One Per TV Set



Source: Nielsen; Based on Scaled Installed counts for 10/15/07.



# DVR Homes Tend To Be More Upscale; Highly Educated

Market Break	Total U.S.	DVR	Non-DVR
HH Income\$100K+	14%	30%	12%
HH w/ Children	35%	44%	34%
HOH ED=4+ College	31%	42%	29%



Source: Nielsen. Jan 07



# And More High Tech, With Lots Of Other Electronic Equipment

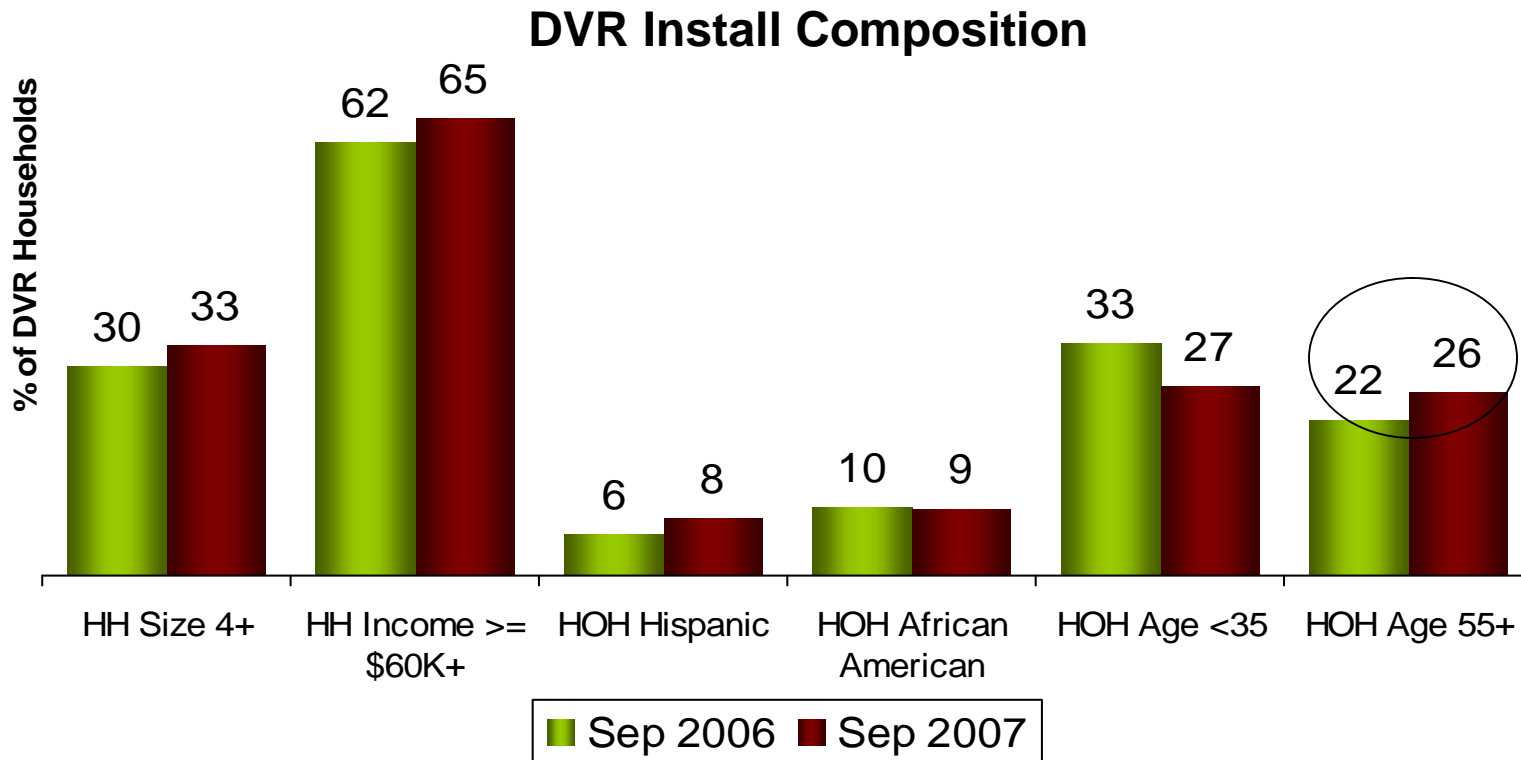
Market Break	Total U.S.	DVR	Non-DVR
PC Owner	77%	93%	75%
VCR Owner	78%	69%	79%
Video Game Owner	41%	50%	39%
TV Sets 2+	78%	87%	77%
DVD Owner	86%	93%	85%



Source: Nielsen. Jan 07



# DVR Penetration Is Broadening As The Older Population Segment Now Comprise 26% of DVR Households – On Par With The Younger Households



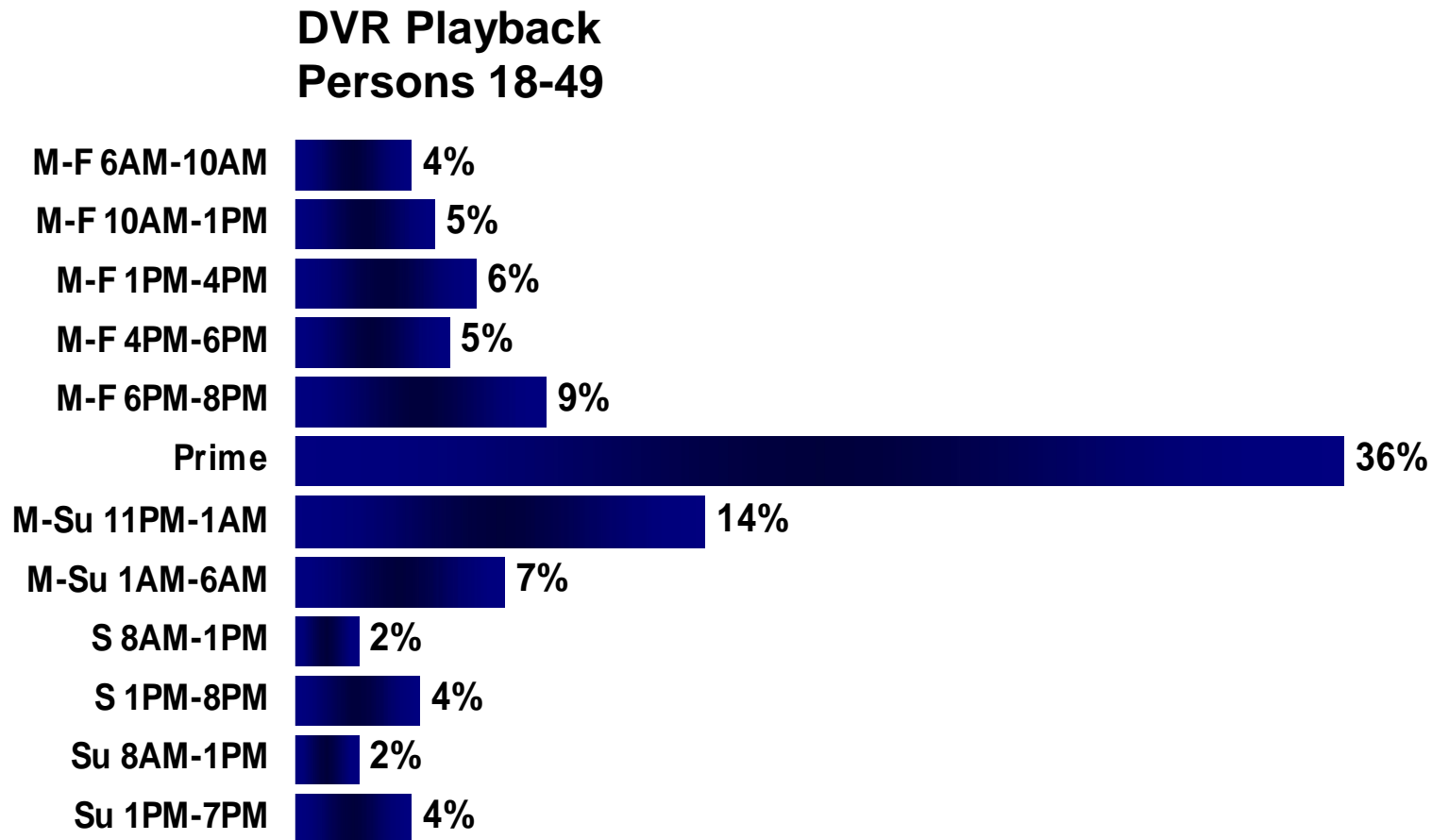
Source: Nielsen, 11/07. Based on Scaled Installed counts.



# Usage?



# Primetime & Late Night Exhibit Largest Playback Activity

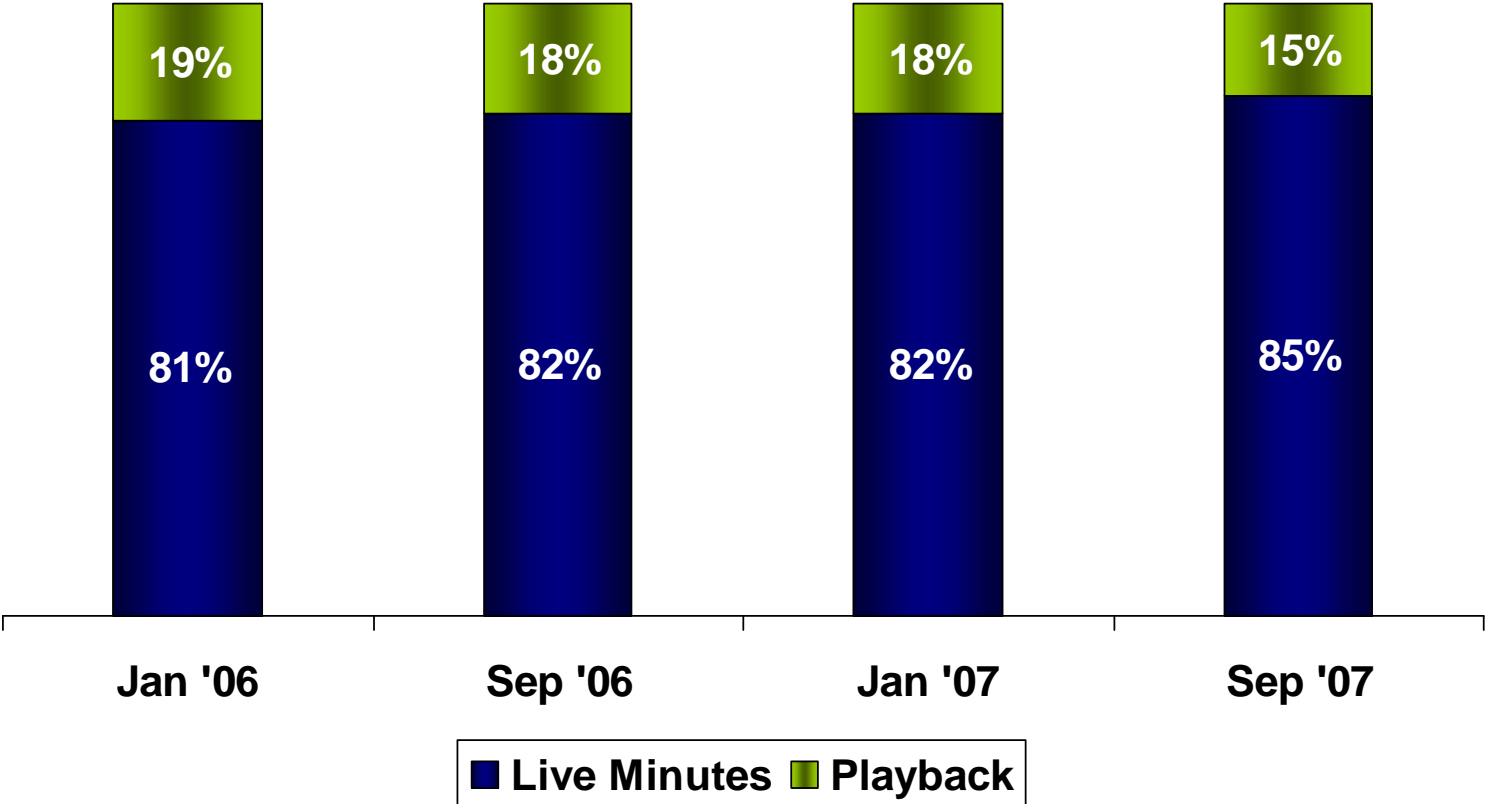


Source: Nielsen; 5/07.



# 85% Of All Viewing Still Occurs “Live” During Primetime

P18-49 Playback among DVR Households

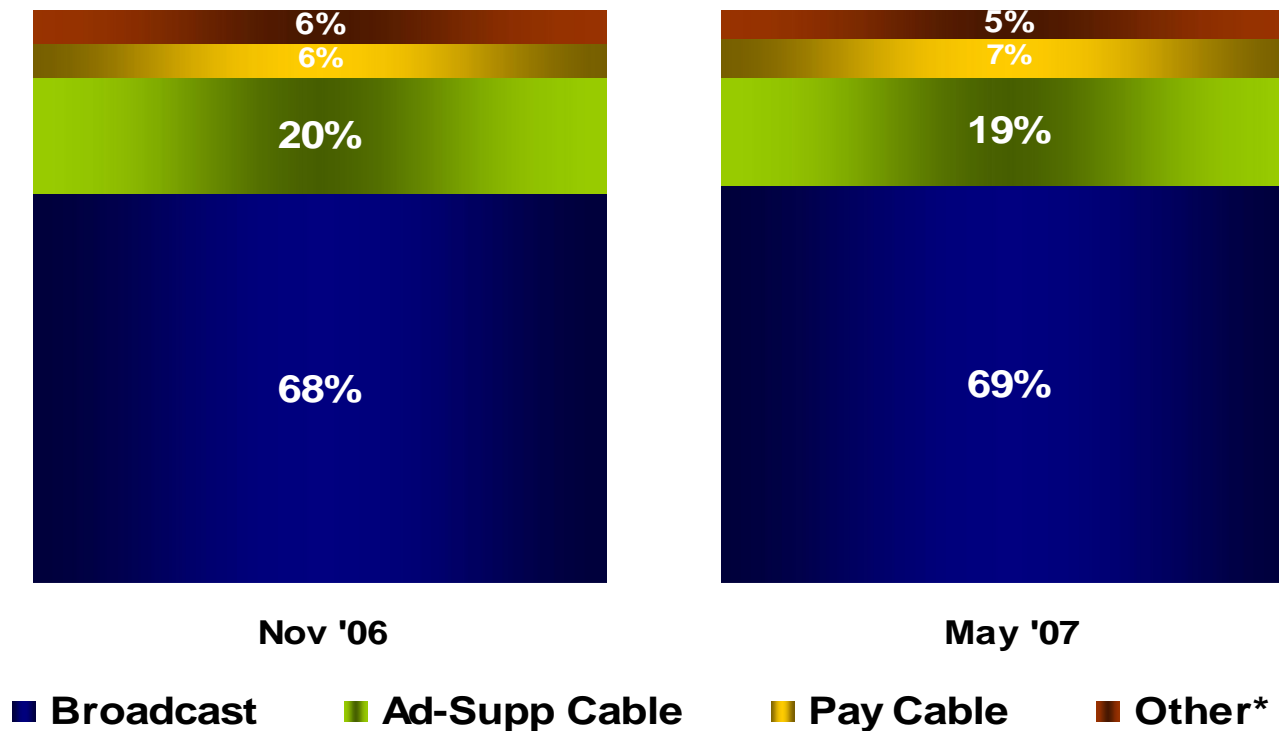


Source: Nielsen, 11/07, Primetime.



# Broadcast TV Accounts For Majority Of Playback Minutes

## Distribution of 7-Day Playback During Primetime



\*Other includes PBS, Independents, All Other Cable Origination, and Other (AOT)

Source: Nielsen.



# Other Important Facts On DVR Usage

- More time-shifted viewing occurs among Persons 25-44.
- Half of Playback occurs same day, with 90% within three days.
- More Co-Viewing occurs in playback than in live.
- Diary homes time-shifted viewing is very similar to meter homes.
- Program vs Commercial Ratings:
  - DVR viewing of programs and commercials varies based on time elapsed between original airing and playback.
  - DVR playback that occurs closest to the original telecast retains more of the audience during commercials than DVR playback that occurs further out.



Source: Nielsen. Jan 07



# Primetime Timeshifted Viewing Analysis

LIVE= 9/24-12/9/07

LIVE + SD = includes same day DVR playback 9/24-12/9/07

LIVE + 7 = includes 7 days of DVR playback 9/24-12/9/07

AD-SUPPORTED CABLE					
	LIVE LIVE+ SD			LIVE+7 LIVE+7 v. LIVE	
	AA%	AA%	% CHANGE	AA%	% CHANGE
HH	33.4	33.8	1.2%	33.4	0.0%
P2+	17.1	17.4	1.8%	17.1	0.0%
P18-49	16.4	16.7	1.8%	16.6	1.2%
P18-34	15.5	15.9	2.6%	15.7	1.3%
P25-54	17.1	17.4	1.8%	17.3	1.2%
P2-11	11.6	11.7	0.9%	11.6	0.0%
P12-17	14.8	14.9	0.7%	14.7	-0.7%
P18-24	15.2	15.4	1.3%	15.1	-0.7%
P25-34	15.7	16.2	3.2%	16.2	3.2%
P35-49	17.3	17.7	2.3%	17.5	1.2%
P50+	21.3	21.5	0.9%	21	-1.4%

BROADCAST SEVEN					
	LIVE LIVE+ SD			LIVE+7 LIVE+7 v. LIVE	
	AA%	AA%	% CHANGE	AA%	% CHANGE
HH	27.1	28.1	3.7%	29.9	10.3%
P2+	14.6	15.3	4.8%	16.5	13.0%
P18-49	13.8	14.7	6.5%	16.1	16.7%
P18-34	11.5	12.5	8.7%	13.6	18.3%
P25-54	16	17.0	6.3%	18.5	15.6%
P2-11	5.2	5.5	5.8%	5.4	3.8%
P12-17	7.7	8.0	3.9%	8.4	9.1%
P18-24	9.6	10.1	5.2%	10.6	10.4%
P25-34	13	14.1	8.5%	15.8	21.5%
P35-49	16.4	17.3	5.5%	18.8	14.6%
P50+	22.2	22.6	1.8%	23.7	6.8%



Source: CAB analysis of Nielsen Galaxy program level data; Primetime.

# Total Day Timeshifted Viewing Analysis

LIVE= 9/24-12/9/07

LIVE + SD = includes same day DVR playback 9/24-12/9/07

LIVE + 7 = includes 7 days of DVR playback 9/24-12/9/07

	AD-SUPPORTED CABLE					
	LIVE+ SD			LIVE+7		LIVE+7 v. LIVE
	AA%	AA%	% CHANGE	AA%	% CHANGE	
HH	19.3	19.5	1.0%	19.4	0.5%	
P2+	9.2	9.4	2.2%	9.3	1.1%	
P18-49	9.1	9.2	1.1%	9.2	1.1%	
P18-34	8.9	9.1	2.2%	9.0	1.1%	
P25-54	9.3	9.4	1.1%	9.4	1.1%	
P2-11	7.2	7.3	1.4%	7.3	1.4%	
P12-17	7.6	7.6	0.0%	7.6	0.0%	
P18-24	9.1	9.2	1.1%	9.1	0.0%	
P25-34	8.8	9.0	2.3%	9.0	2.3%	
P35-49	9.2	9.4	2.2%	9.3	1.1%	
P50+	10.9	10.9	0.0%	10.8	-0.9%	

	BROADCAST SEVEN					
	LIVE+ SD			LIVE+7		LIVE+7 v. LIVE
	AA%	AA%	% CHANGE	AA%	% CHANGE	
HH	17.4	17.8	2.3%	18.1	4.0%	
P2+	8.9	9.2	3.4%	9.6	7.9%	
P18-49	8.5	8.9	4.7%	9.5	11.8%	
P18-34	7.1	7.6	7.0%	8.0	12.7%	
P25-54	9.5	10	5.3%	10.5	10.5%	
P2-11	3.3	3.5	6.1%	3.5	6.1%	
P12-17	4.7	4.8	2.1%	4.9	4.3%	
P18-24	6.0	6.1	1.7%	6.4	6.7%	
P25-34	8.0	8.5	6.3%	9.0	12.5%	
P35-49	9.8	10.2	4.1%	10.7	9.2%	
P50+	13.5	13.8	2.2%	14.1	4.4%	



Source: CAB analysis of Nielsen Galaxy program level data; total day.

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