
Multi-Screen Insights: TV, Internet and Mobile Usage



Nielsen Three Screen Report
1st Quarter 2010

Note To Our Members:

This document is meant to provide the latest findings regarding consumer's TV, Internet and Mobile video consumption habits

This document is a library of “slides to go” and is not meant to be presented in its entirety to clients

These slides were created on a white background so they can easily be inserted into your current presentation template

Please view the document in slideshow mode

***Video is Being Consumed Across all Devices
at a Record Pace...***

Television Continues to Hit All-Time Highs



<u>Monthly</u>	<u>Watching Television in the home</u>	<u>% Difference (1Q '10 vs. 1Q '09)</u>
# of viewers	286 Million	+0.6%
Time Spent (hours: minutes)	158:25	+1.3%

Americans watch more and more TV each year

More Consumers are Watching Online Video For a Longer Period of Time



<u>Monthly</u>	<u>Watching Video on a Computer</u>	<u>% Difference (1Q '10 vs. 1Q '09)</u>
# of viewers	135 Million	+2.6%
Time Spent (hours: minutes)	3:10	+3.3%

However, *short form video* (such as YouTube clips) still comprises 83% of online video viewing

Consumers are Embracing Mobile Video



<u>Monthly</u>	<u>Watching Video on a Mobile Phone</u>	<u>% Difference (1Q '10 vs. 1Q '09)</u>
# of viewers	20.3 Million	+51.2%
Time Spent (hours: minutes)	3:37	FLAT

Unlike online video, name-brand TV content comprises the majority of mobile video viewing

Television Remains the Dominant Video Outlet

Monthly Video Consumption by Device



**Watching Television
in the home**



**Watching Video on
a Computer**



**Watching Video on
a Mobile Phone**

of viewers

286 Million

135 Million

20 Million

**Time Spent
(hours: minutes)**

158:25

3:10

3:37

TV accounts for 96% of Total Video Time Per Month

Consumers Are Adding Video Consumption Platforms and Not Replacing Them

Monthly Overall Usage Of Users 2+



Watching Television
in the home



Watching Video on
a Computer



Watching Video on
a Mobile Phone

of viewers

286 Million

135 Million

20 Million

% Diff Yr to Yr

+0.6%

+2.6%




+51.2%

Consumers are spending more and more time watching video across a multitude of platforms.

Does Each Demographic Consume Video in the Same Way?




Television is Clearly Where All Consumers Spend the Majority of their Screen Time

Weekly Time Spent in Hours: Minutes

	<u>K2-11</u>	<u>T12-17</u>	<u>A18-24</u>	<u>A25-34</u>	<u>A35-49</u>	<u>A50-64</u>	<u>A65+</u>	<u>P2+</u>
 Watching Traditional Television	25:48	24:28	26:45	32:03	36:35	44:20	48:54	35:34
 Watching Video on Internet	0:04	0:10	0:30	0:36	0:31	0:18	0:07	0:20
 Mobile Subscribers Watching Video on a Mobile Phone	n/a	0:18	0:10	0:07	0:03	0:01	<0:01	0:04




Surprisingly, Adults (Not Teens & Kids) Are Driving Internet Video Consumption

Weekly Time Spent in Hours: Minutes

	<u>K2-11</u>	<u>T12-17</u>	<u>A18-24</u>	<u>A25-34</u>	<u>A35-49</u>	<u>A50-64</u>	<u>A65+</u>	<u>P2+</u>
 Watching Traditional Television	25:48	24:28	26:45	32:03	36:35	44:20	48:54	35:34
 Watching Video on Internet	0:04	0:10	0:30	0:36	0:31	0:18	0:07	0:20
 Mobile Subscribers Watching Video on a Mobile Phone	n/a	0:18	0:10	0:07	0:03	0:01	<0:01	0:04






Teens Are Instead Watching Mobile Video... At About the Same Rate as Internet Video

Weekly Time Spent in Hours: Minutes

	<u>K2-11</u>	<u>T12-17</u>	<u>A18-24</u>	<u>A25-34</u>	<u>A35-49</u>	<u>A50-64</u>	<u>A65+</u>	<u>P2+</u>
 Watching Traditional Television	25:48	24:28	26:45	32:03	36:35	44:20	48:54	35:34
 Watching Video on Internet	0:04	0:10	0:30	0:36	0:31	0:18	0:07	0:20
 Mobile Subscribers Watching Video on a Mobile Phone	n/a	0:18	0:10	0:07	0:03	0:01	<0:01	0:04

However, Television is Still the Primary Video Option for the Younger Group

Weekly Time Spent in Hours: Minutes

	<u>K2-11</u>	<u>T12-17</u>	<u>A18-24</u>
 <p>Watching <i>Traditional Television</i></p>	25:48	24:28	26:45
 <p>Watching <i>Time-shifted Television</i></p>	1:32	1:20	1:31
 <p>Using the <i>Internet</i></p>	0:24	0:59	2:57
 <p>Watching <i>Video on Internet</i></p>	0:04	0:10	0:30
 <p><i>Mobile Subscribers</i> Watching <i>Video on a Mobile Phone</i></p>	n/a	0:18	0:10

Kids and Teens Actually Spend a Quarter Less Time Online Than Adults

Weekly Time Spent in Hours: Minutes

	<u>K2-11</u>	<u>T12-17</u>	<u>A18-24</u>	<u>A25-34</u>	<u>A35-49</u>	<u>A50-64</u>	<u>A65+</u>	<u>P2+</u>
<i>Watching Traditional Television</i>	25:48	24:28	26:45	32:03	36:35	44:20	48:54	35:34
<i>Watching Time-shifted Television</i>	1:32	1:20	1:31	3:00	2:50	2:30	1:17	2:09
<i>Using the Internet</i>	0:24	0:59	2:57	5:21	6:28	5:00	2:35	3:52
<i>Watching Video on Internet</i>	0:04	0:10	0:30	0:36	0:31	0:18	0:07	0:20
<i>Mobile Subscribers Watching Video on a Mobile Phone</i>	n/a	0:18	0:10	0:07	0:03	0:01	<0:01	0:04

What About Simultaneously Viewing of TV and Internet?

6 out of 10 People Have Gone Online and Watched TV Simultaneously in the Past Month

**Person 2+ Watching TV and using the Internet
Simultaneously At Least Once Per Month**

**% of Persons Using TV / Internet
Simultaneously** **59.0%**

**Estimated # of Persons Using TV
/ Internet Simultaneously** **133,907**

However, This Accounts for Only 3% of All TV Viewing

Person 2+ Watching TV and using the Internet Simultaneously At Least Once Per Month

% of Persons Using TV / Internet Simultaneously

59.0%

Estimated # of Persons Using TV / Internet Simultaneously

133,907

Avg % of TV time spent using the Internet

3.4%

...But Over One-Third of Internet Time

Person 2+ Watching TV and using the Internet Simultaneously At Least Once Per Month

**% of Persons Using TV / Internet
Simultaneously**

59.0%

**Estimated # of Persons Using TV
/ Internet Simultaneously**

133,907

**% of Internet Time spent also
using TV**

33.9%