
Time-Shifting In 2011

Never miss a minute of your favorite shows.

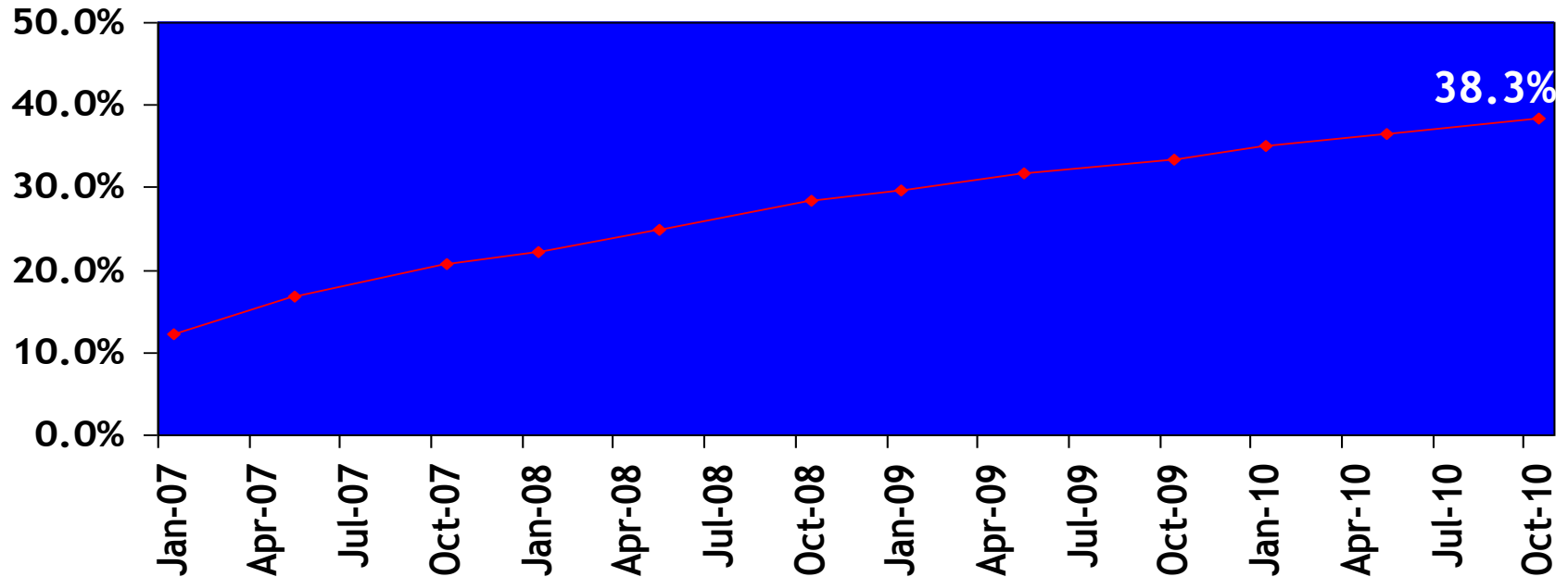


DVR Household Statistics



Four Out Of Ten Homes Have A DVR

% of U.S. TV HHs



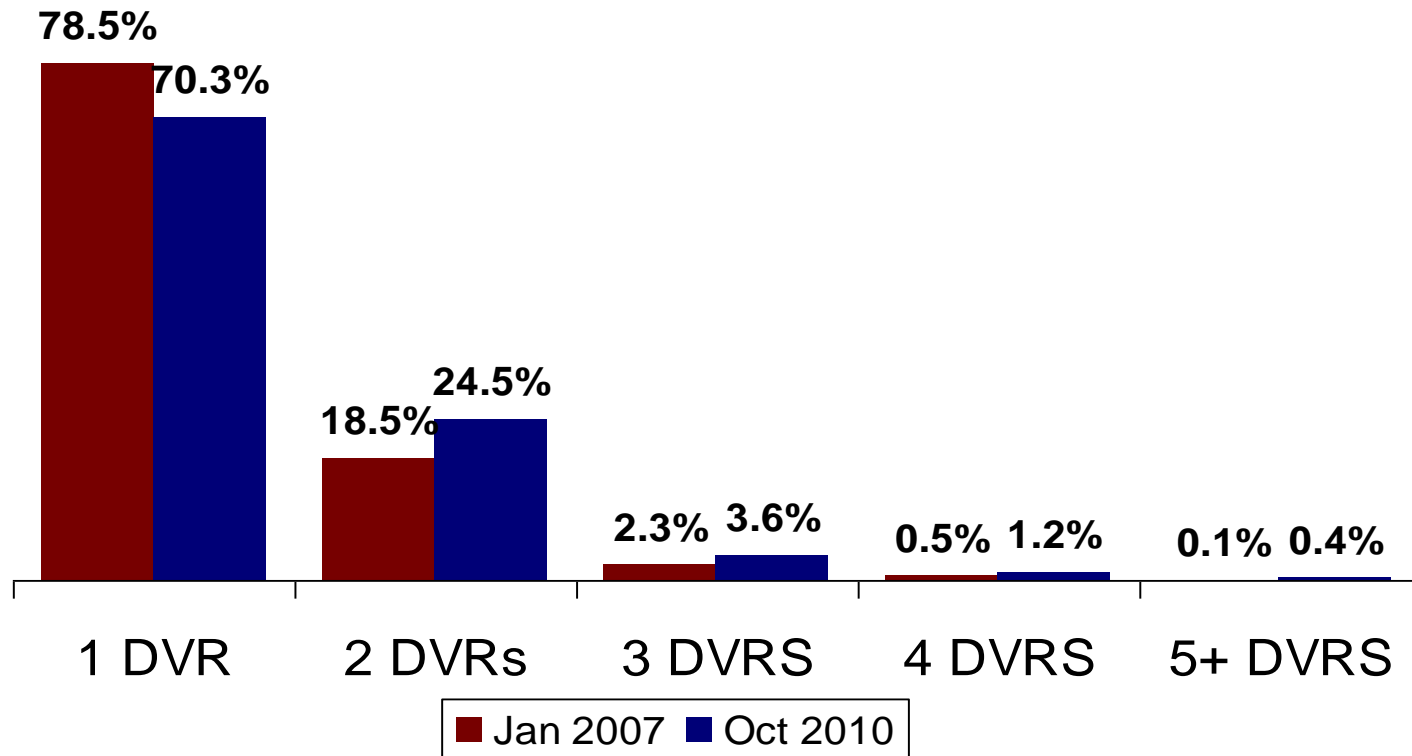
Cable Accounts for 58% of All DVR Homes

Among African American & Hispanic Households, DVR Penetration Has Doubled

	<u>Oct '07</u>	<u>Oct '10</u>
Hispanic	14.8%	29.0%
African American	16.3%	30.7%

DVR Households Are Quickly Becoming Multi-DVR Homes

Percent Of Homes with Multiple DVRs



DVR Homes Tend To Be More Upscale and Highly Educated

Market Break	Total U.S.	DVR	Non-DVR
HH Income \$100K+	16%	26%	10%
HOH: Profess/Managerial	29%	38%	24%
HH Size 4+	26%	31%	24%
HH w/ Children	35%	40%	32%
HOH 4+ Years College	32%	40%	28%

DVR Homes Tend To Be More High Tech; Owning Other Electronic Equipment

Market Break	Total U.S.	DVR	Non-DVR
PC Owner	84%	95%	77%
VCR Owner	49%	47%	50%
Video Game Owner	44%	56%	36%
TV Sets 4+	19%	26%	15%
DVD Owner	87%	92%	84%
High Def Cap/Receivable	57%	75%	46%

How Nielsen Measures DVR Homes



Nielsen DVR Measurement Capabilities

National Measurement

Prior to 2006, homes with PVRs/DVRs were not measurable and excluded from the sample.

The A/P meter enabled Nielsen to measure time-shifted viewing beginning on 12/26/05 in its national syndicated services.

Local Measurement

The A/P meter enabled Nielsen to measure time-shifted viewing beginning on 12/26/05 in local people meter markets (LPM).

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

Nielsen's A/P Meter

Measures viewing in a digital environment.

Playback credited to time of viewing as of 2010.

Reads video/audio codes actively embedded in content stream by programmer using a unique encoder.

Home must be in-tab on both day of record and playback to be included.

Trick mode data (fast forward/rewind) are outside scope of A/P meter.

Installed on all sets of a Household (one type of meter prompt in a HH).

Nielsen Reports Multiple Streams Of Viewing

National Sample:

Live	Live viewing only (excludes DVR playback)
Live + Same Day	Live viewing plus same day DVR playback (up to 3am)
Live + 1D	27 hours
Live +2D	51 hours
Live+ 3D	75 hours
Live + 7	168 hours

Local Sample:

Live	Live viewing only (excludes DVR playback)
Live+SD	Live viewing plus same day DVR playback (up to 3am)
Live + 7	168 hours

Digital Video Recorder Usage



Half Of Playback Occurs Within Same Day

49% of Playback Occurs Within Same Day

88% of Playback Occurs Within Three Days

Time Spent With Time-Shifted Programming Is Minimal

Monthly Time Spent In Hrs:Min Per User 2+

	2Q09	2Q10	% Diff v. YAG	HRS:Min Diff v. YAG
Watching TV in the home*	143:51	143:37	-0.2%	-0:14
Watching Timeshifted TV (all homes)	8:02	9:27	17.7%	1:25
DVR Playback (only in DVR Homes)	24:11	24:27	1.1%	0:16

Viewers Aged 25-34 Watch The Most Television By DVR Playback

Monthly Time Spent In Hrs:Min

	CH2-11	T1217	A18-24	A25-34	A35-49	A50-64	A65+
Watching TV in the home*	107:32	103:46	113:54	130:21	145:06	173:40	196:21
Watching Timeshifted TV (all homes)	6:49	6:01	6:56	12:52	12:15	10:56	6:02
DVR Playback (only in DVR Homes)	16:13	15:50	19:30	29:29	28:31	28:45	23:27

DVR Playback Accounts For A Small Portion Of Total TV Viewing Across The Board

Monthly Time Spent In Hrs:Min

	CH2-11	T1217	A18-24	A25-34	A35-49	A50-64	A65+
Watching TV in the home*	107:32	103:46	113:54	130:21	145:06	173:40	196:21
Watching Timeshifted TV (all homes)	6:49	6:01	6:56	12:52	12:15	10:56	6:02

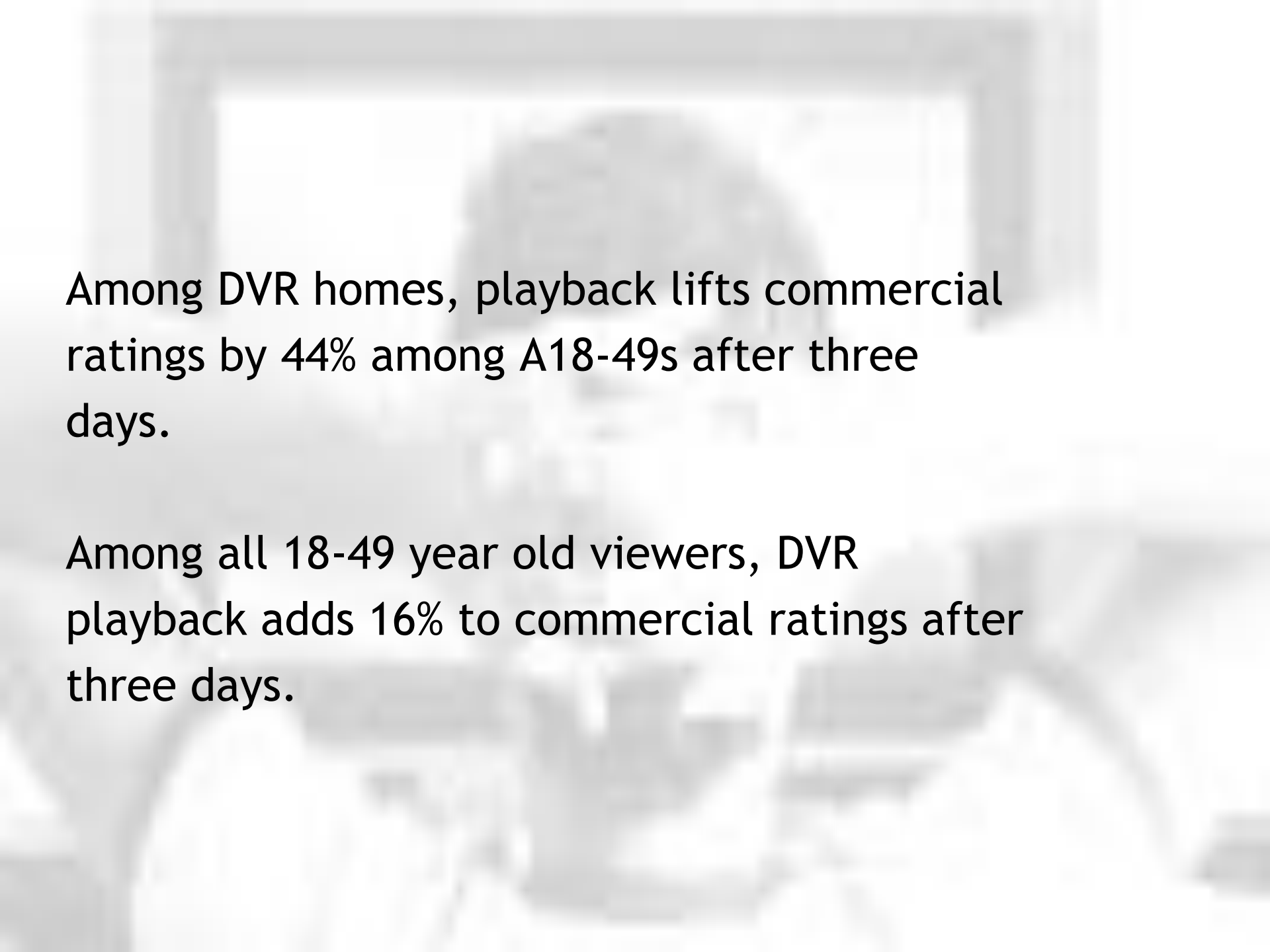
Blacks & Hispanics Spend The Least Amount Of Time Time-Shifting

Monthly Time Spent In Hrs:Min By Ethnicity Per User 2+

	White	Black	Hispanic	Asian
Watching TV in the home	138:56	199:06	126:08	92:06
Watching Timeshifted TV (all homes)	10:36	6:32	5:57	6:47



Of Those Who Time-Shift,
Half Watch Commercials

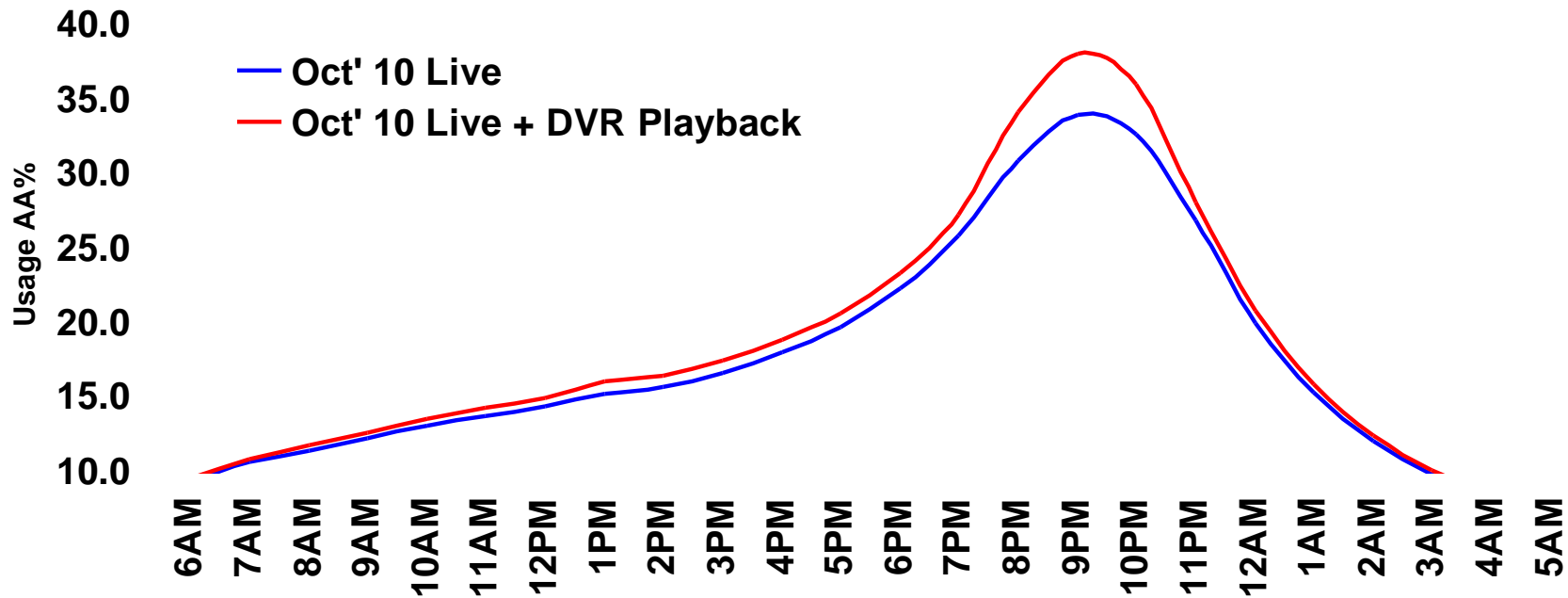


Among DVR homes, playback lifts commercial ratings by 44% among A18-49s after three days.

Among all 18-49 year old viewers, DVR playback adds 16% to commercial ratings after three days.

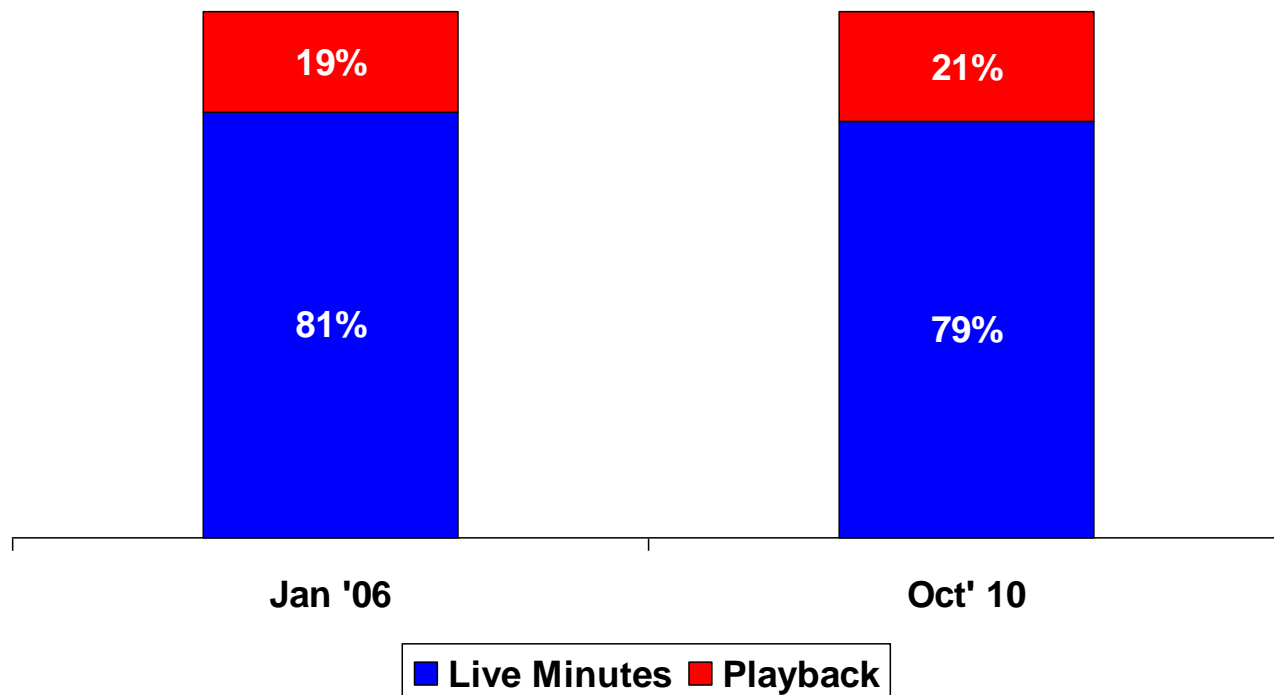
TV Usage Does Not Fall When A DVR Is Acquired; In Fact Playback Increases Total TV Usage

TV Usage By Hour Among A18-49



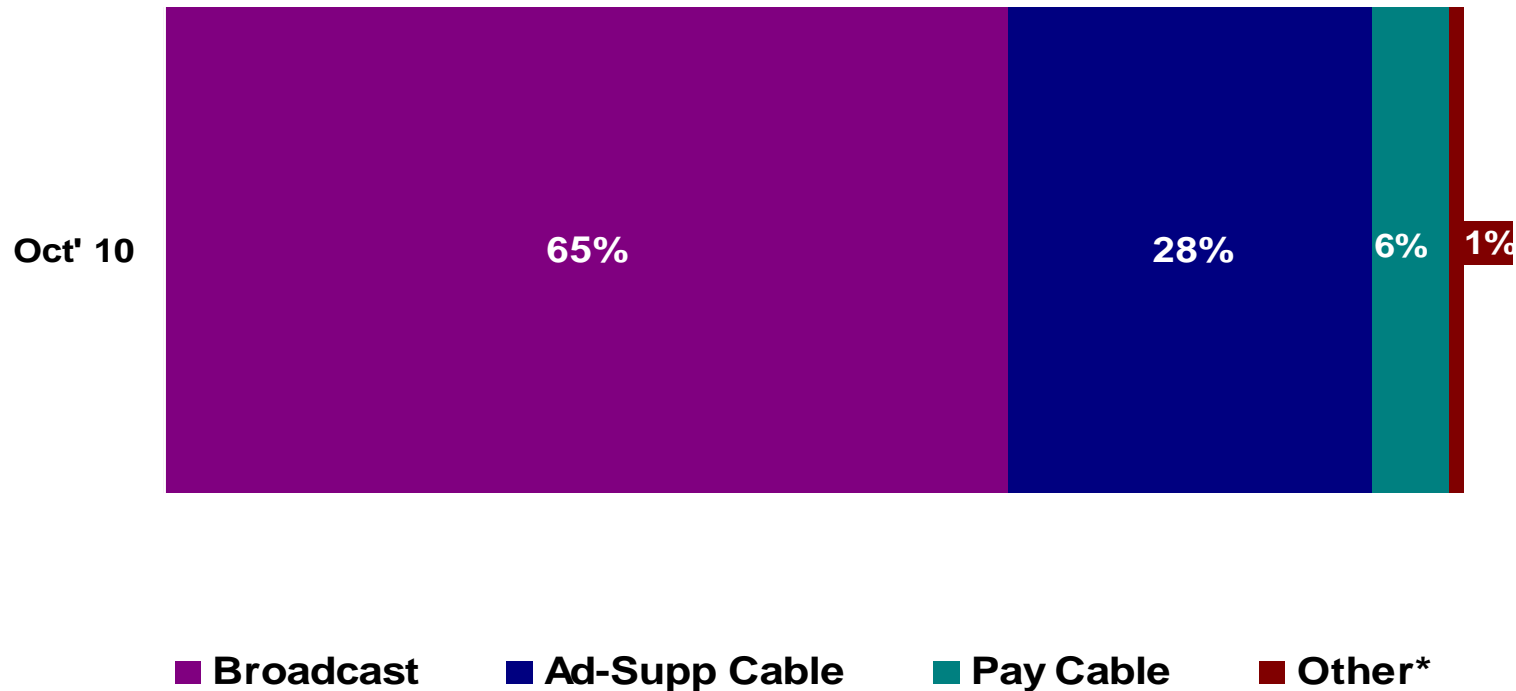
Among P18-49, 79% Of All Viewing Still Occurs “Live” During Primetime

P18-49 Playback In Primetime among DVR Households



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)

Broadcasts' Highest Rated Programming Tends To Be The Most Time-Shifted

Top 10 Time-Shifted Broadcast 7 Programming Among A18-49
 Primetime: October 2010
Base: DVR HH

Rank	Net	Program Name	Playback Only A18-49 AA%	A18-49 Rank (Total U.S)
1	ABC	MODERN FAMILY	6.26	3
2	ABC	GREY'S ANATOMY	5.69	5
3	CBS	THE BIG BANG THEORY	5.49	8
4	NBC	OFFICE	4.86	11
5	FOX	GLEE	4.72	9
6	CBS	HOW I MET YOUR MOTHER	4.02	25
7	FOX	HOUSE	4.00	23
8	CBS	SURVIVOR: NICARAGUA	3.95	18
9	ABC	DESPARATE HOUSEWIVES	3.86	12
10	CBS	TWO & A HALF MEN	3.79	7

Cable's Most Time-Shifted Programming

Top 10 Time-Shifted Cable Programming Among A18-49

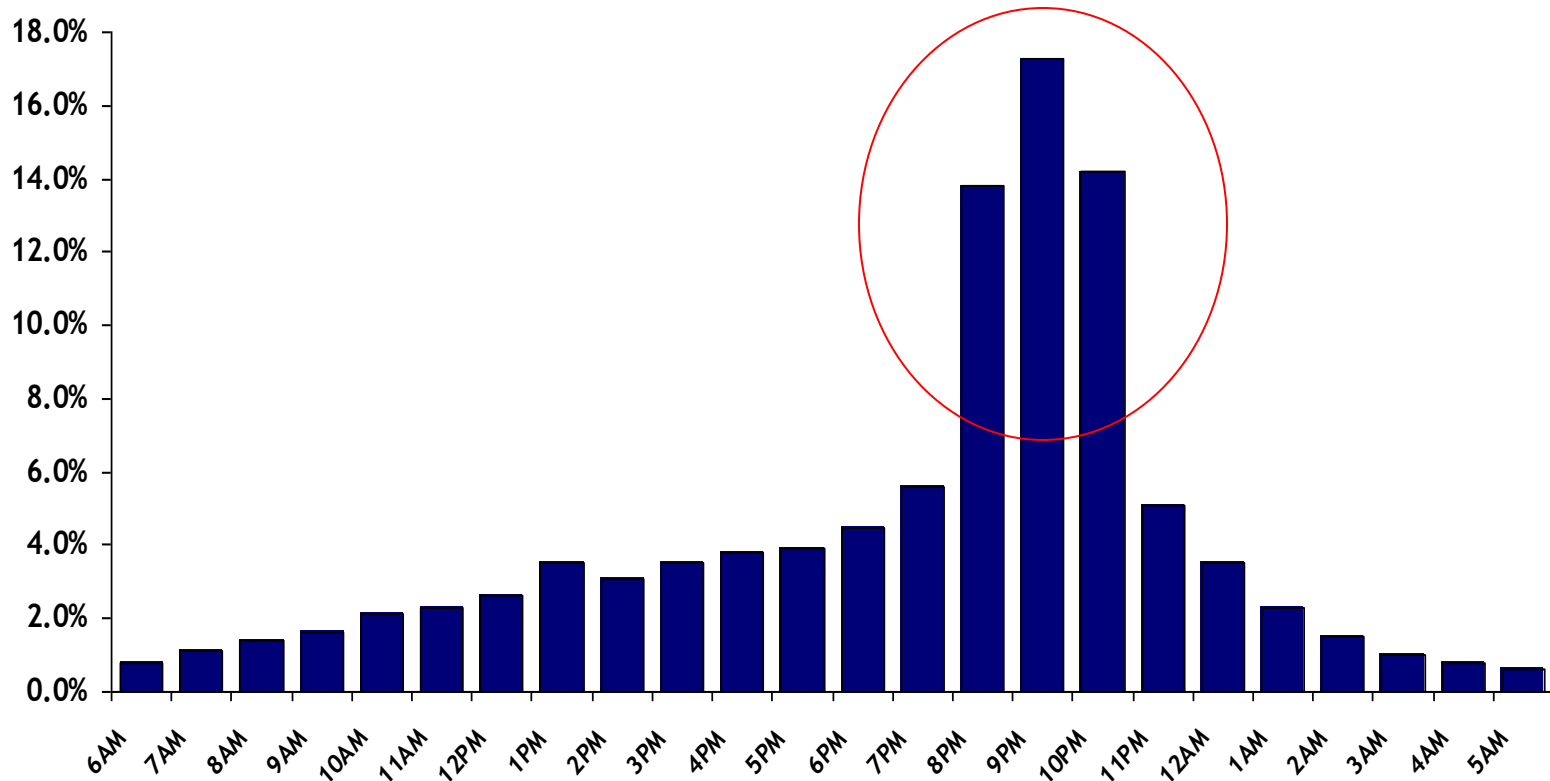
Primetime: October 2010

Base: DVR HH

Rank	Net	Program Name	Live+7 DVR A18-49 AA%	A18-49 Rank (Total U.S)
1	AMC	WALKING DEAD	2.49	2
2	LIFETIME	PROJECT RUNWAY	2.21	6
3	FX	SONS OF ANARCHY	1.97	5
4	MTV	MY CHEMICAL ROMANCE	1.93	4
5	AMC	MAD MEN	1.50	13
6	FX	ALWAYS SUNNY IN PHILI	1.46	14
7	SPIKE TV	ULTIMATE FIGHTER	1.10	10
8	BRAVO	TOP CHEF JUST DESSERTS	.74	37
9	MTV	JERSEY SHORE 2:REUNION	.72	19
10	FX	LEAGUE	.72	45

Playback Distribution By Hour: Primetime & Late Night Exhibit Largest Playback Activity

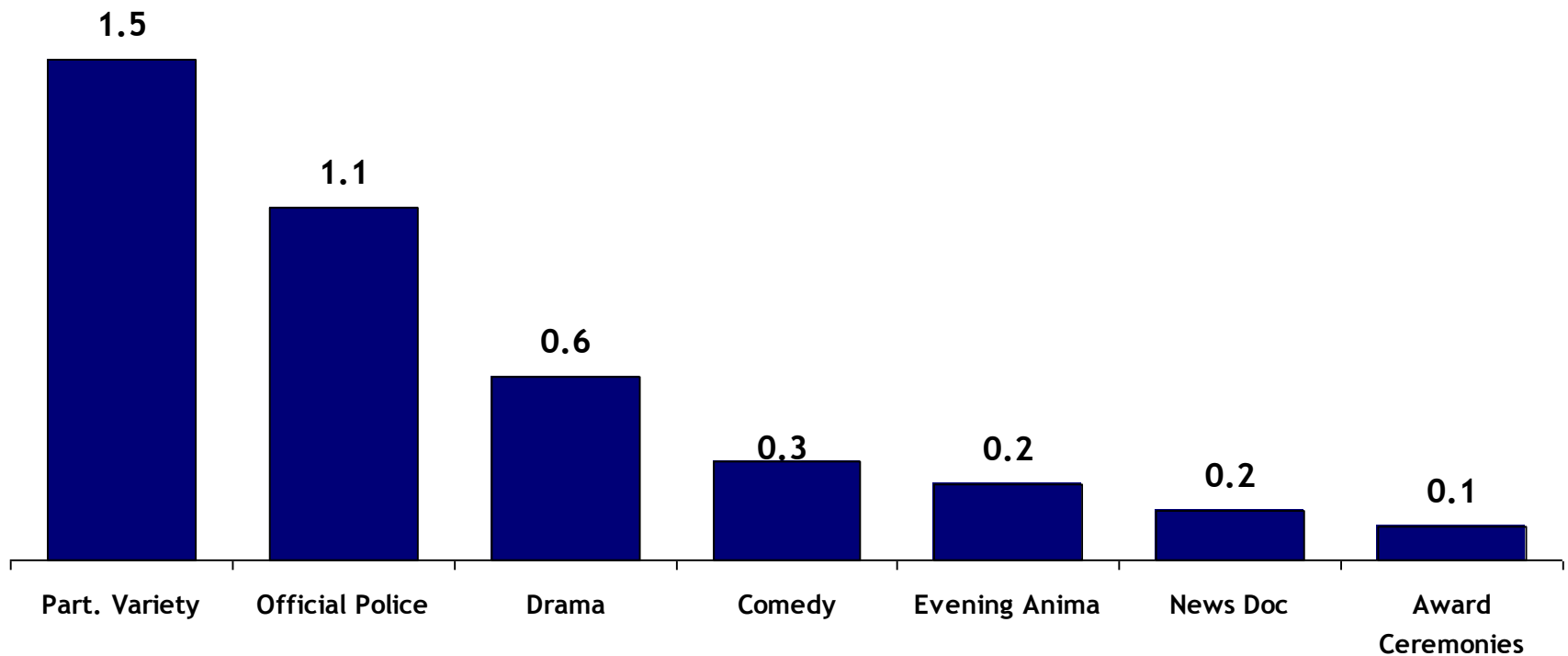
DVR Playback Distribution By Hour Among A18-49 in DVR HHs



Program Type Determines the Degree Of DVR Playback

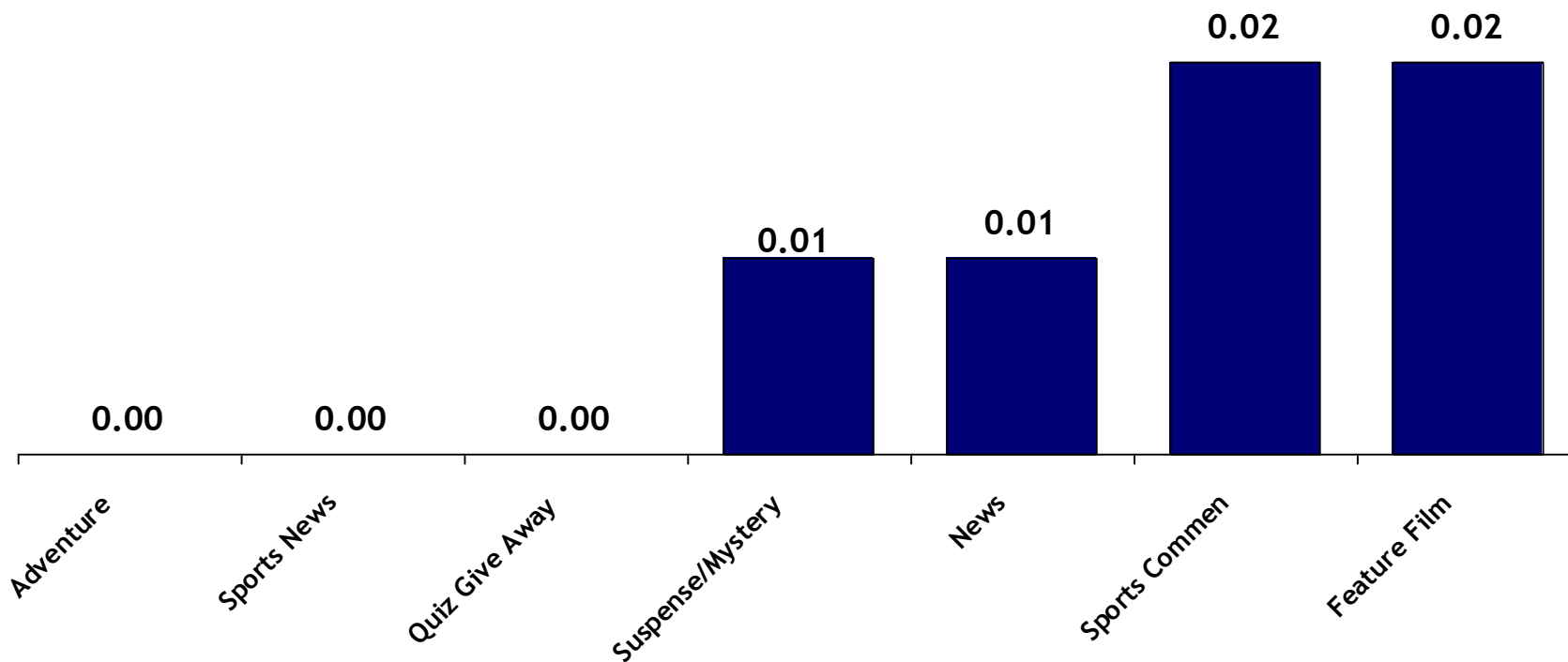
Participation Variety & General Dramas Tend To Be The Most Time Shifted In Primetime

A18-49 Live+7 v. Live AA% Gain By Genre In Primetime
in DVR HHs



While Sports, News & Movies Are Watched Predominately Live

A18-49 Live+7 v. Live AA% Gain By Genre In Primetime in DVR HHs



The Future...Enhanced TV Services



Enhanced TV Services Offered By Your Cable Provider: Offering A Variation On the DVR

Various MSO's are rolling out the following services in select markets. These services are free with Digital Cable:

Start Over – Provides you with the power to restart and watch a program from the beginning. With Start Over, the fast-forwarding function will be turned off. Shows airing can be restarted multiple times within their normal broadcast time. For example, if a program airs from 7 to 7:30, you will be able to restart it at any time during that half hour until 7:29 and 59 seconds.

And while you're watching a Start Over show, you can:

REWIND the show while it's playing

PAUSE it for up to 5 minutes

RESUME: change the channel then come back within 5 minutes to where you left off in your Start Over program (as long as the show is still in it's original broadcast window).

Nielsen classifies viewing to “Start Over” services as DVR Playback.

Note: Start Over may not be available in all areas.

Look Back - Allows you to view shows that have already aired up to 3 days later!

Quick Clips - A new Video On Demand service that allows you to easily access short-form and topic specific video content created and distributed by TV networks. They are available for a limited amount of time, as determined by TV networks.