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# Time-Shifting In 2012

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Never miss a minute of your favorite shows.



# DVR Household Statistics

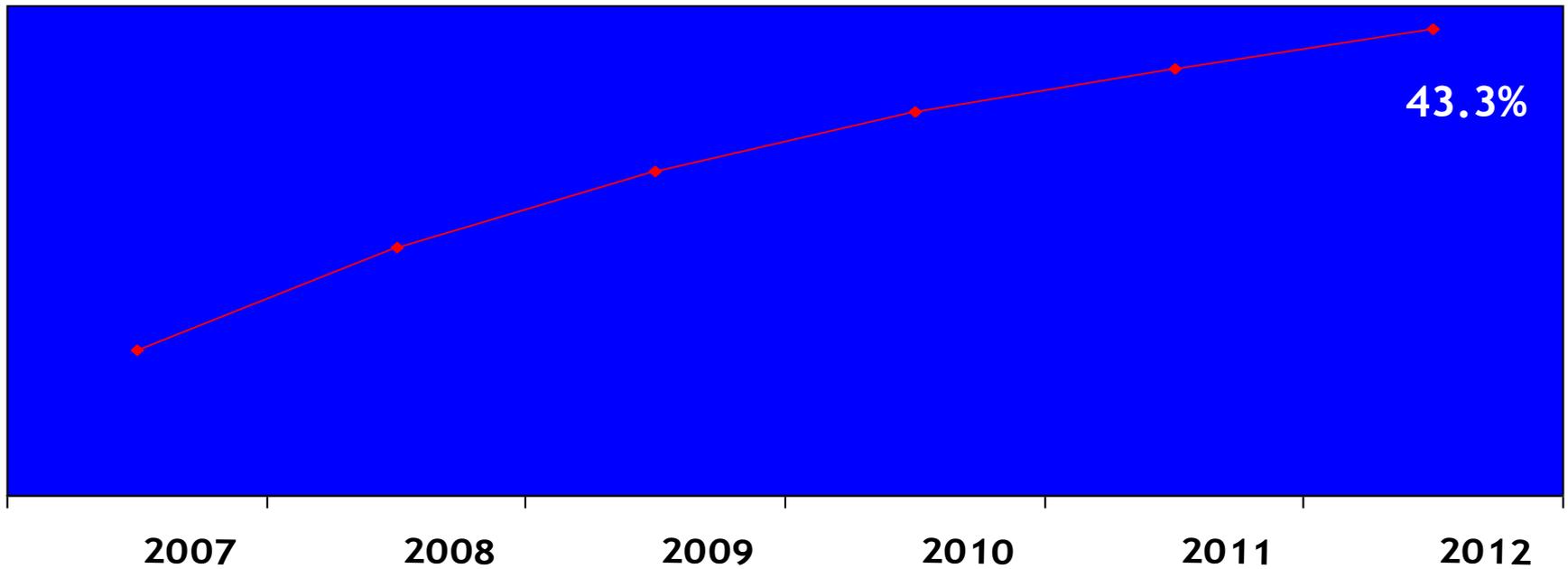
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# Today Four Out Of Ten Homes Have A DVR

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% of U.S. TV HHs



# DVR Penetration Among African American & Hispanic Households Has Grown Substantially

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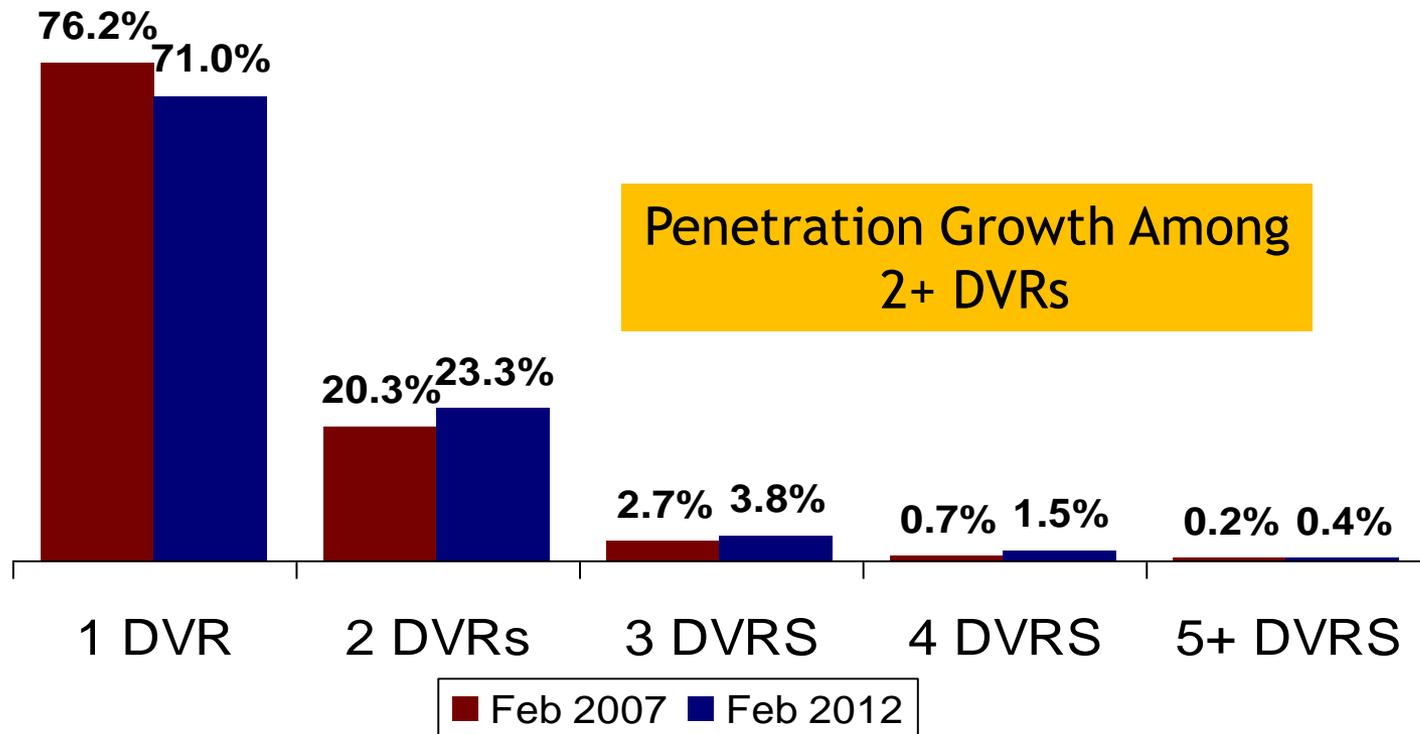
## DVR Penetration %

	<u>Feb '07</u>	<u>Feb '12</u>
Hispanic	8.4%	33.4%
African American	11.1%	37.4%



# DVR Households Are Becoming Multi-DVR Homes

Percent Of Homes with Multiple DVRs



# How Nielsen Measures DVR Homes

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# How DVR Homes Are Measured...

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## National & LPM Markets - A/P Meter

Playback credited to time of viewing.

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).

Local Markets - 8-day diaries sent to DVR HHs in all set meter & diary markets.

# Digital Video Recorder Usage

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# Time Spent Time-Shifting Programming Has Grown But Is Still Only A Fraction Of Total Time Spent With TV

Monthly Time Spent In Hrs:Min Per User 2+

	3Q10	3Q11	% Diff v. YAG	HRS:Min Diff v. YAG
Watching TV in the home*	145:28	146:45	0.9%	1:17
Watching Timeshifted TV (all homes)	9:32	10:51	13.8%	1:19
DVR Playback (only in DVR Homes)	23:58	24:27	2.0%	0:29

# Viewers Aged 25-49 Tend To Time-Shift The Most

Monthly Time Spent In Hrs:Min

	CH2-11	T1217	A18-24	A25-34	A35-49	A50-64	A65+
Watching TV in the home*	116:46	109:15	113:46	125:55	143:22	178:29	203:50
Watching Timeshifted TV (all homes)	9:11	7:30	7:54	13:33	13:32	12:12	7:46
DVR Playback (only in DVR Homes)	19:08	16:39	18:52	28:17	27:09	28:02	24:51



Source: Nielsen, 3Q11 Cross Platform Report. \*Includes live viewing + DVR playback.

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

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Monthly Time Spent In Hrs:Min

	CH2-11	T1217	A18-24	A25-34	A35-49	A50-64	A65+
Watching TV in the home*	116:46	109:15	113:46	125:55	143:22	178:29	203:50
Watching Timeshifted TV (all homes)	9:11	7:30	7:54	13:33	13:32	12:12	7:46

# Ethnic Breakdown: 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	142:05	205:56	125:48	95:55
Watching Timeshifted TV (all homes)	11:52	8:25	6:50	8:14

Source: Nielsen, 3Q11 Cross Platform Report. \*Includes live viewing + DVR playback.



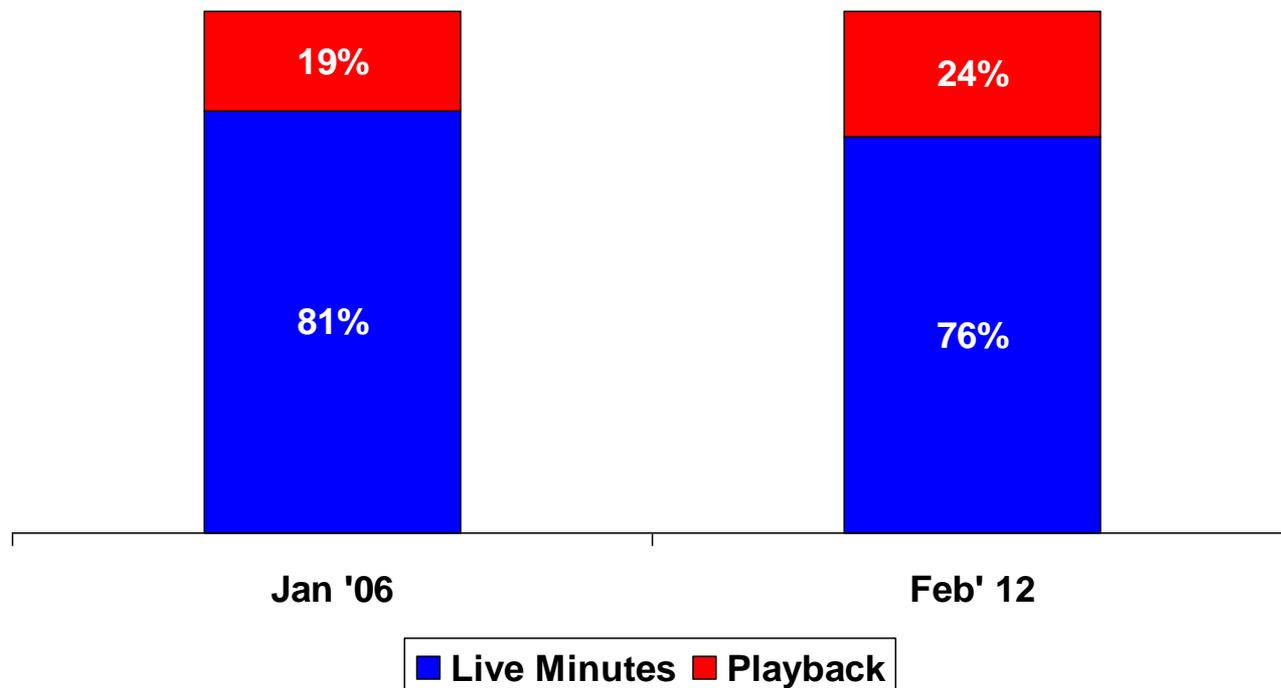
A blurred background image showing a person sitting at a desk, possibly watching a commercial. The person is wearing a dark jacket and is looking towards the camera. The desk has some papers and a computer monitor. The overall scene is out of focus, emphasizing the text in the foreground.

Of Those Who Time-Shift,  
Half Watch Commercials

# Among P18-49, 76% Of All Viewing Still Occurs “Live” During Primetime

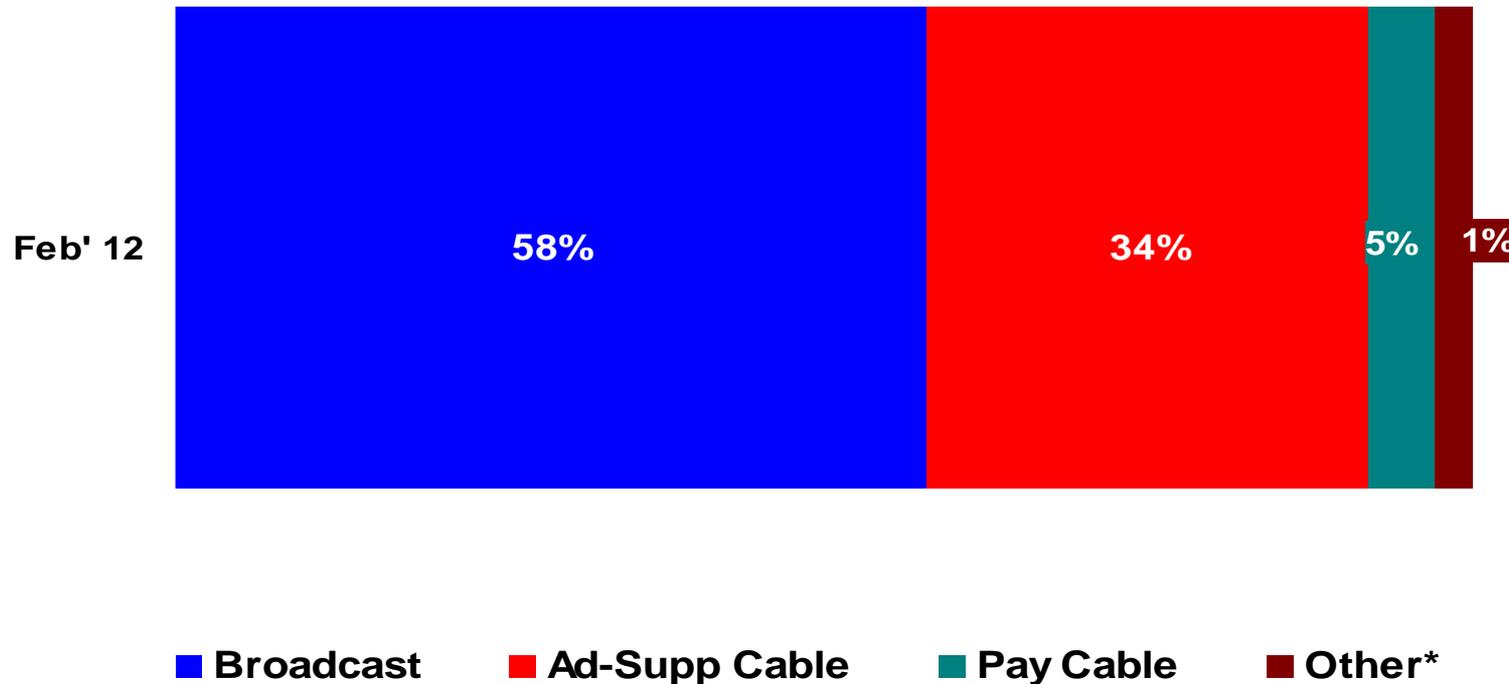
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## P18-49 Playback In Primetime among DVR Households



# Broadcast TV Accounts For Majority Of Playback Minutes

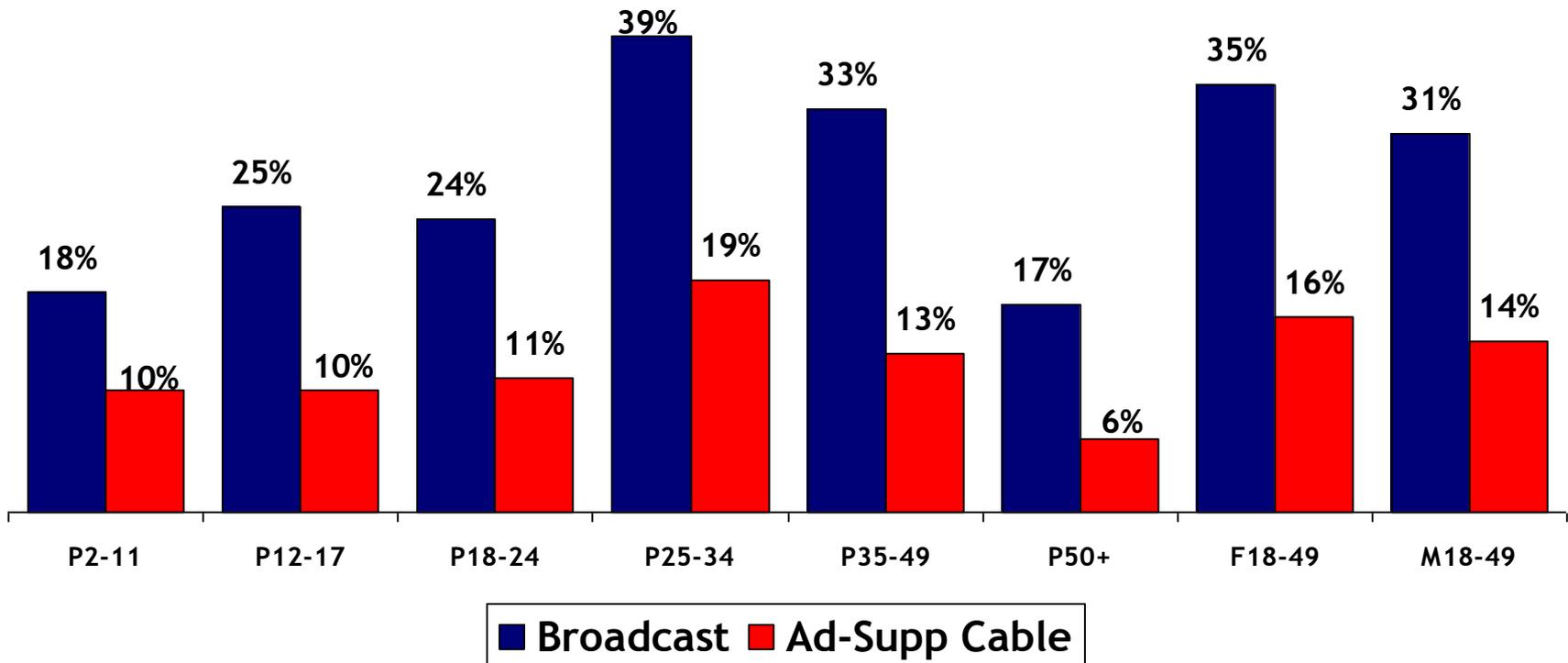
## Distribution of 7-Day Playback During Primetime - A18-49



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

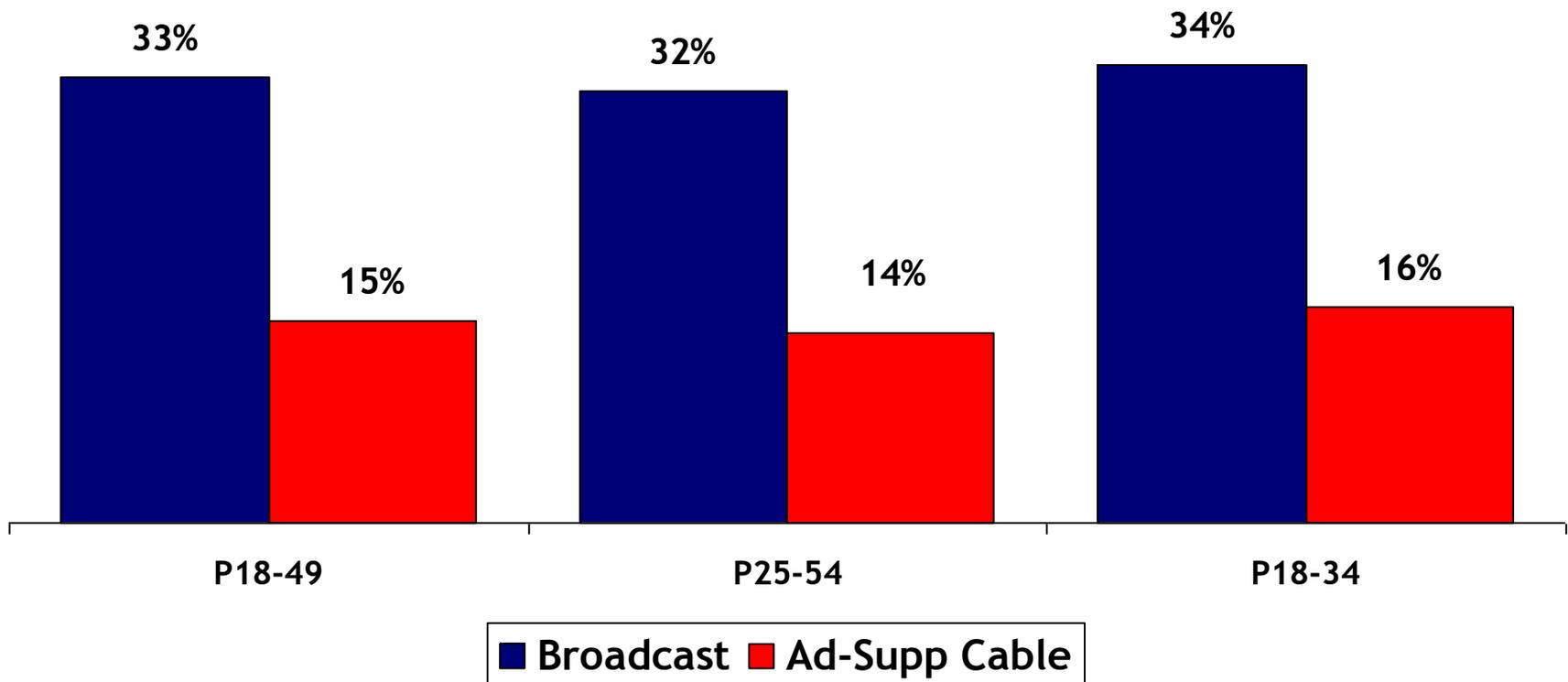
# Across The Board, A Larger Percentage Of Broadcasts' Audience Watches In DVR Playback Mode

Live+7 v. Live Percent Rating Change  
In Primetime



# Among Key Advertiser Targets - Broadcast Programming Tends To Be Time-Shifted More

Live+7 v. Live Percent Rating Change  
In Primetime



# In Fact, Broadcasts' Highest Rated Programming Tends To Be The Most Time-Shifted

## Top 10 Most Time-Shifted Broadcast Programs Primetime: February 2012 *Base: DVR HH*

Rank	Net	Program Name	Playback Only A18-49 AA%	A18-49 Rank (Total U.S)
1	ABC	MODERN FAMILY	6.98	4
2	CBS	BIG BANG THEORY, THE	6.80	2
3	ABC	GREY'S ANATOMY	5.23	9
4	FOX	AMERICAN IDOL-THURSDAY	5.09	5
5	FOX	AMERICAN IDOL-WEDNESDAY	4.92	3
6	FOX	NEW GIRL	4.72	11
7	NBC	OFFICE	4.69	16
8	FOX	GLEE	4.59	12
9	ABC	ONCE UPON A TIME	4.47	14
10	CBS	NCIS	4.28	17

Source: Nielsen's Npower; Prime=M-Sa 8-11p & Su 7pm. Base= DVR HHs;2/1-2/26/12; Broadcast 6 A18-49 total U.S. Live+7rank (greater or equal to 2 t/c).

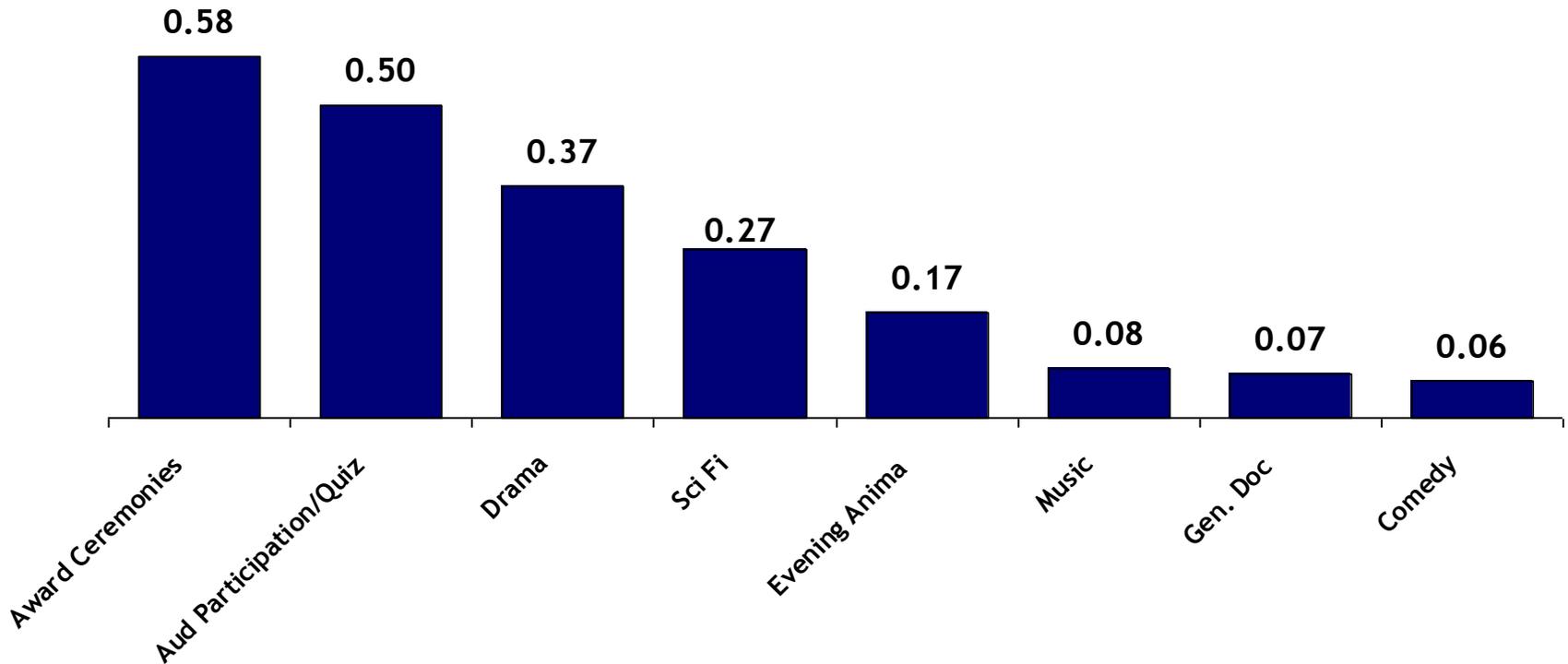


# **Program Type Determines the Degree Of DVR Playback**

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

A18-49 Live+7 v. Live Absolute Rating Gains By Genre  
Primetime/ DVR HHs



# The Future...Enhanced TV Services

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

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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).

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** - Clips & Extras are available to you for a limited time and are accessed using the Enhanced TV menu. The Enhanced menu appears on selected channels when Clips & Extras content is available.

