



CABLE NATION: Pause...for DVR Insights

# Pause...for DVR Insights

- DVR penetration nears maturity; one in two homes do not own a DVR
  - 60% of ethnic homes do not own a DVR
- DVR households consume more television, spending 28% more time with the TV than non-DVR homes (P18-49/Total Day)
  - 39% more time with TV in Primetime
- Majority of playback occurs during Primetime and extends into Late Night
- ‘Live’ TV still the norm as three quarters of Primetime minutes (P18-49) are viewed live - consistent across the age spectrum
  - Drilling down to market level, majority of time with TV is ‘Live’
- 5 out of 10 Broadcast programming minutes are viewed in playback mode versus only 25% of Cable’s (P18-49, Prime)
  - Broadcast’s highest rated premium priced programs tend to be the most time-shifted
- Over 80% of playback occurs within the first three days; more of Broadcast programming gets viewed outside the C3 window
- Social Media encourages engagement with TV programs, consumers recommend and remind others to view programs and commercials

# DVR Penetration Nears Its Maturity As Growth Slows; Today One In Two Homes Do Not Own A DVR

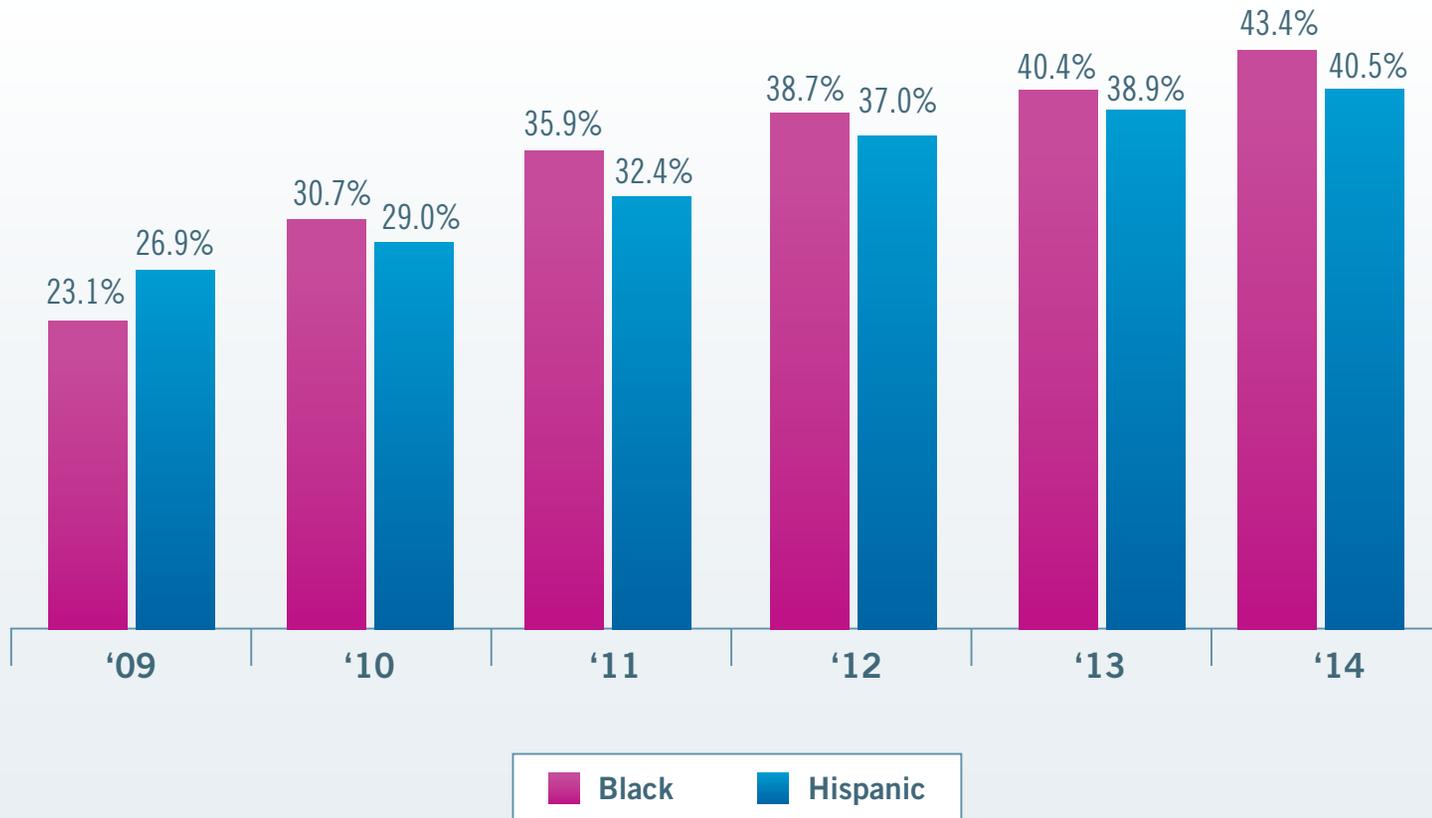
DVR Penetration: % of U.S. TV HHs



Source: Nielsen; October of each year.

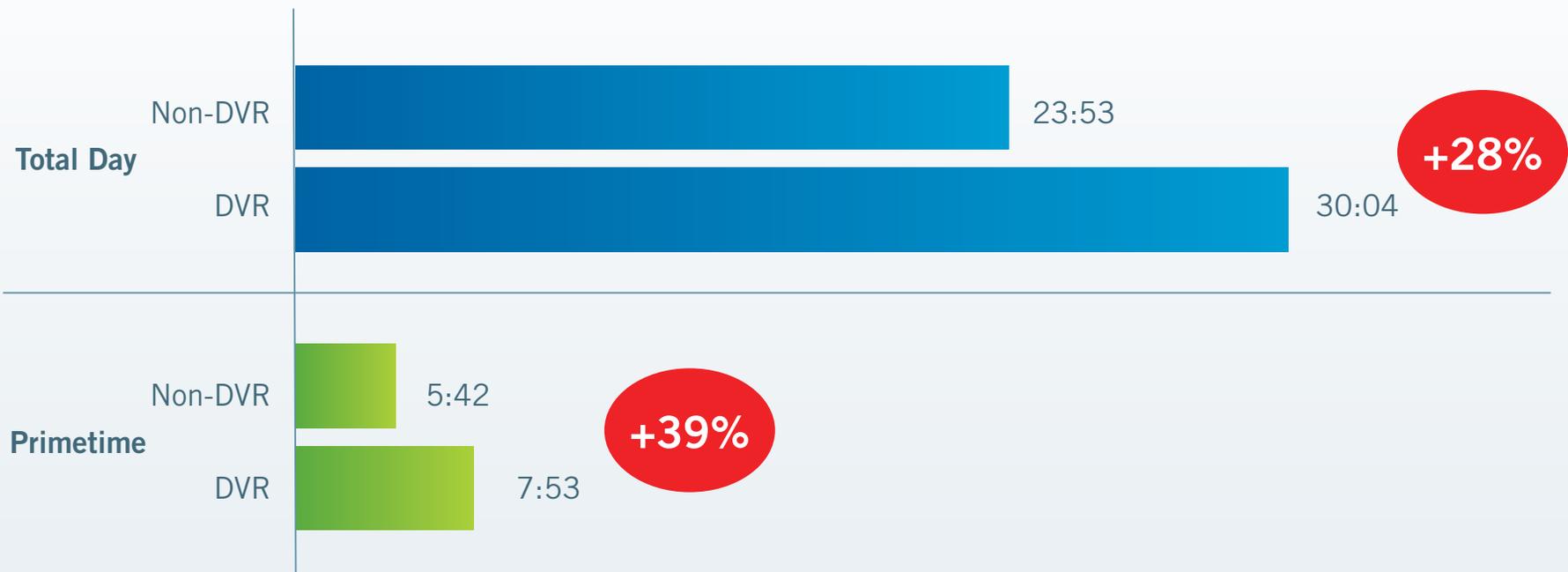
# Among Ethnic Homes, Penetrations Have Grown But More Than Half Still Do Not Own A DVR

## DVR Penetration: % of U.S. TV HHs



# DVR Homes Consume More Television Overall, Spending 39% More Time With TV During Primetime

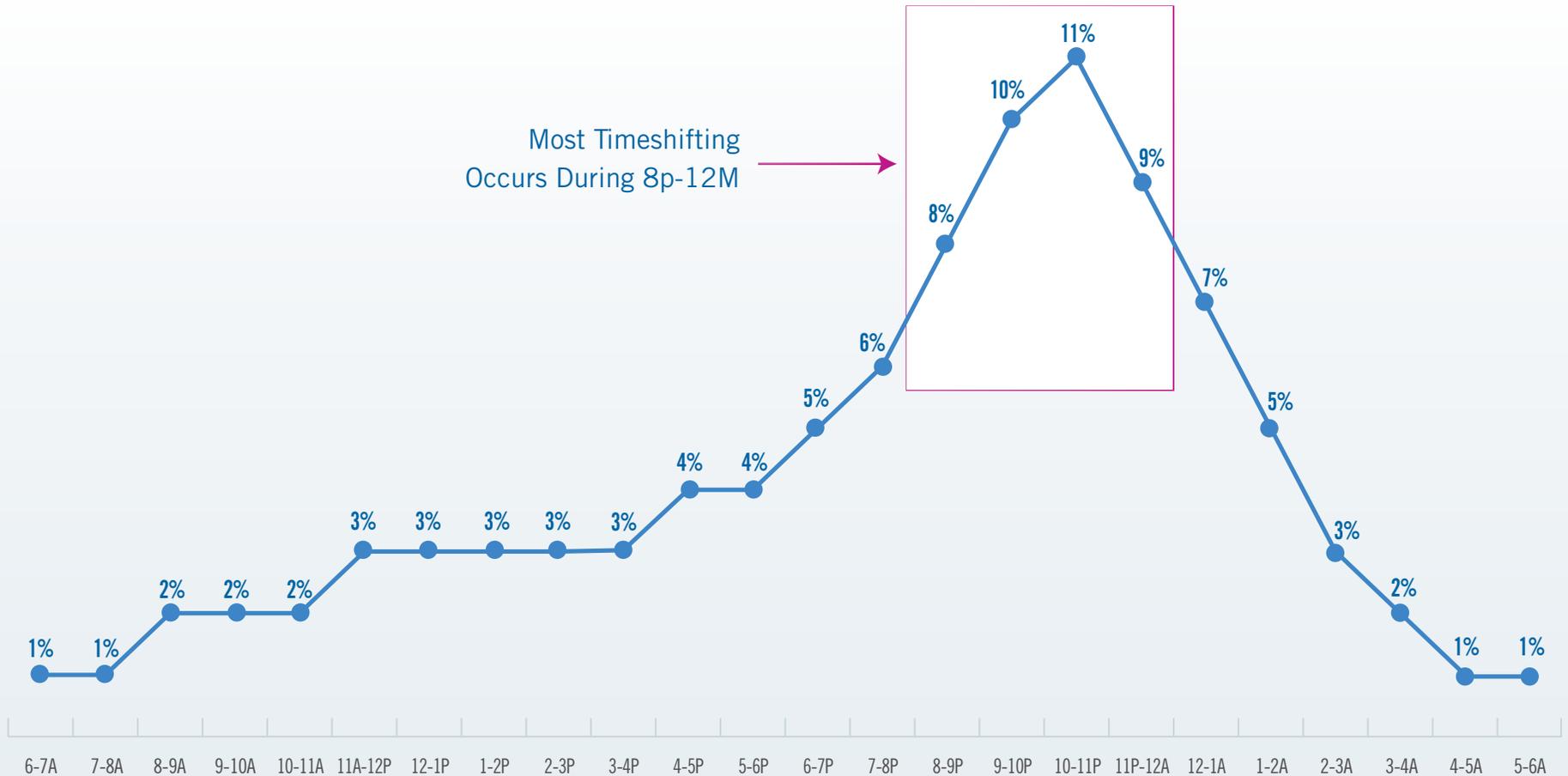
**Time Spent Per Week With TV**  
A18-49/ DVR v. Non-DVR HH



Source: CAB Analysis of Nielsen NPower Live+7 Put; % change of time spent of dvr v non-dvr hh; Prime=M-Sa 8-11&Su 7-11p; M-Su 6a-6a; 9/22-10/26/14

# Majority Of Playback Occurs At Days End... During Primetime and Extends Into Late Night

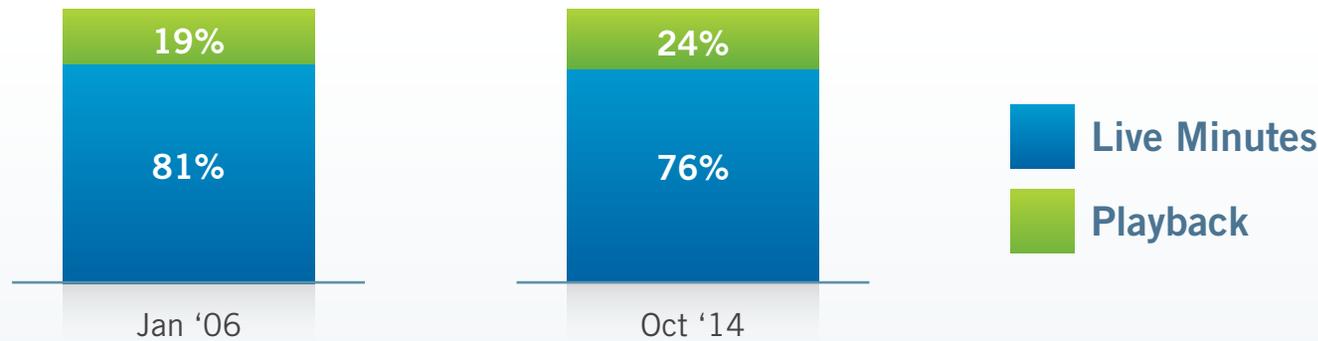
Share of Avg Minutes Viewed in DVR Playback by Hour



Source: CAB Analysis of Nielsen NPower; base= DVR; viewing source=dvr playback; 9/22-10/26/14

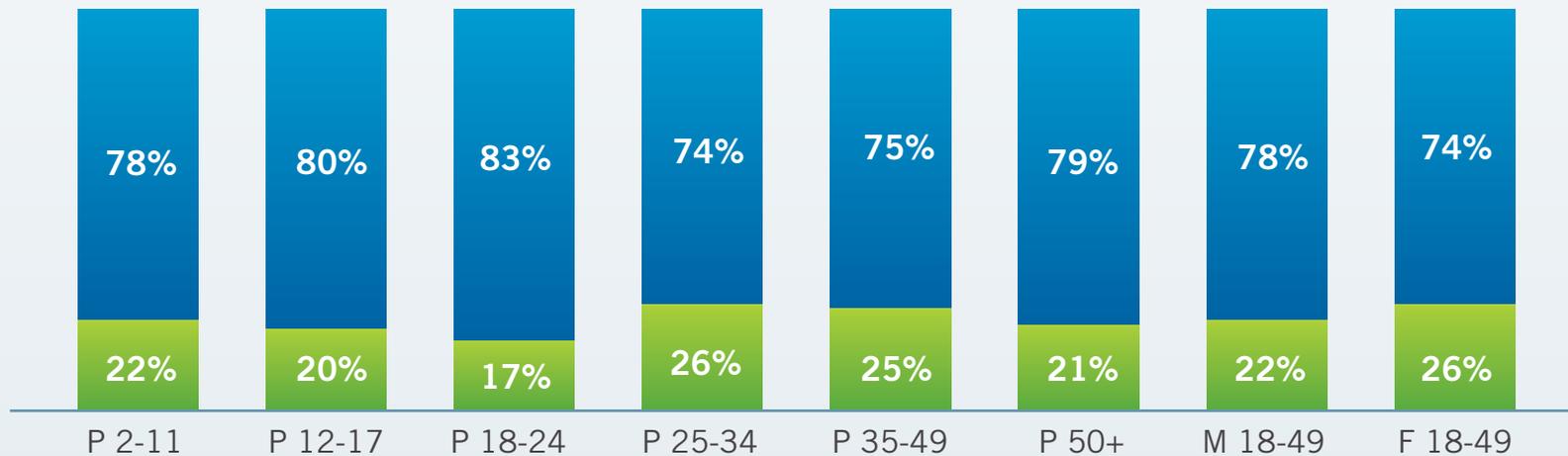
# 'Live TV' Still The Norm As More Than 3 Out of 4 Minutes Are With 'Live' Programming; Time Spent With Time-shifting Is Up Marginally

**% Live v. Playback Minutes: Primetime, P18-49**



## Among Both Young & Old, Time-shifting is Minimal

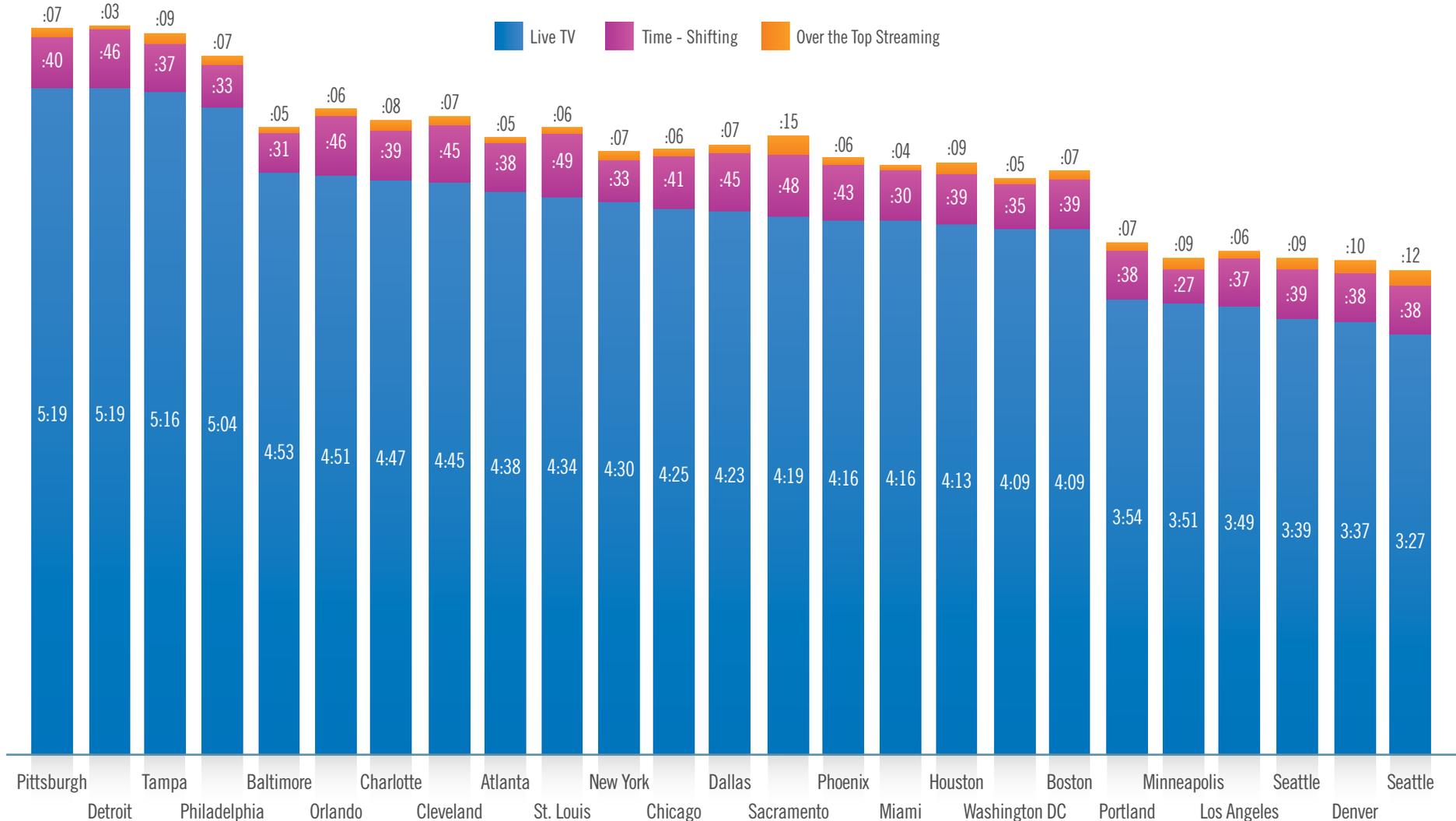
**% Live v. Playback Minutes: Primetime, P18-49**



Source: Nielsen, Base=DVR HHs; 9/22-10/26/14

# Drilling Down To Market Level, *Live TV* Still Makes Up The Bulk of How Consumers Watch

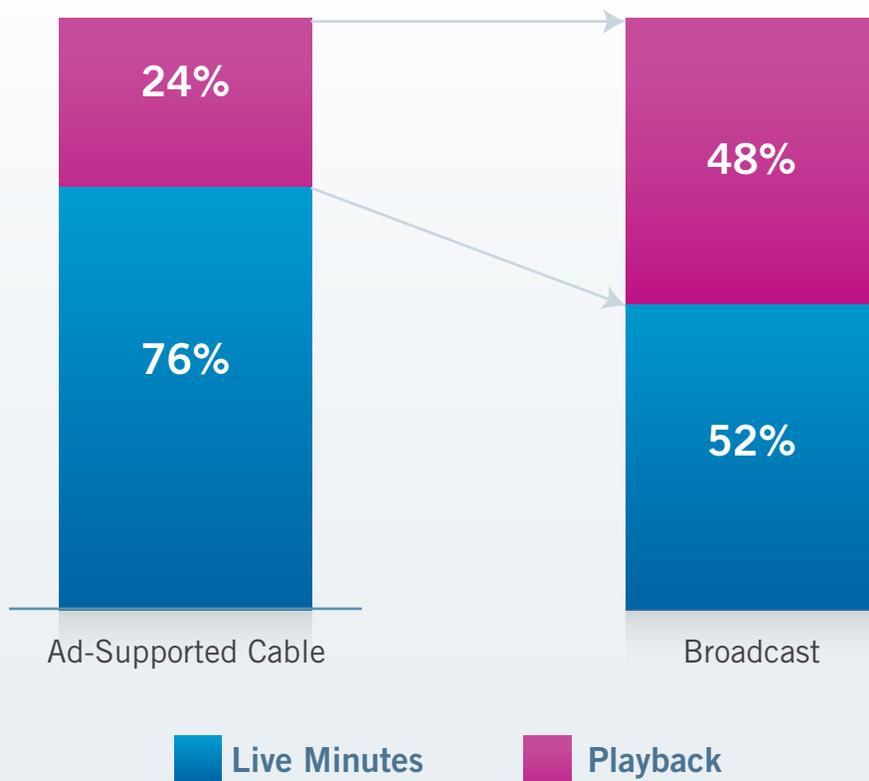
Average Time Spent per Day (HH:MM)



Source: Local Custom toolbox, May 2014, P 25-54, Time Spent Avg. Daily HH:MM, Live PUT, XPLT & OTT among all LPM markets

# Only A Quarter of Ad-Supported Cable's Programming Is Time-shifted versus Half Of Broadcasts – Across the Age Spectrum

**P18-49 % Time-Shifting In Prime  
By Source (base=DVR hhs)**



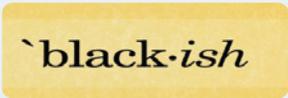
**% Time Spent With Time-Shifted  
Programming in Prime**

	Ad-Supp Cable	Broadcast
A2-11	18%	40%
A12-17	18%	45%
A18-24	20%	41%
A25-34	27%	50%
A35-49	23%	48%
A50+	18%	37%

Source: Nielsen, Base=DVR HHs.; % of minutes; 9/22-10/26/14

# Broadcast's Highest Rated Premium Priced Programs Tend To Be The Most Time-shifted; Advertisers Commercials Are Being Fast-forwarded

## Top 15 Most Time-Shifted Primetime Broadcast Programs

Timeshifted Rank	Program	A18-49 Total Rank
1		1 <sup>st</sup> Rank
2		11 <sup>th</sup> Rank
3		10 <sup>th</sup> Rank
4		9 <sup>th</sup> Rank
5		8 <sup>th</sup> Rank
6		12 <sup>th</sup> Rank
7		7 <sup>th</sup> Rank
8		5 <sup>th</sup> Rank
9		14 <sup>th</sup> Rank
10		11 <sup>th</sup> Rank
11		13 <sup>th</sup> Rank
12		6 <sup>th</sup> Rank
13		23 <sup>rd</sup> Rank
14		16 <sup>th</sup> Rank
15		15 <sup>th</sup> Rank

Source: CAB analysis of Nielsen playback AA% (ranked on playback a1849 AA%); A18-49; Primetime; 9/22 - 10/26/14;  
Rank is based on total U.S. A18-49

# Over 80% Of Playback Occurs Within The First Three Days; Playback During Days 4-7 Is Slightly Greater Among Broadcast Programming

## Playback Day 1-3 v 4-7 Minutes (A18-49): Prime

	DVR Playback	STD '09/10	STD '14/15
<b>Ad-Supported Cable</b>	Days 1-3:	89%	88%
	Days 4-7:	<b>11%</b>	<b>12%</b>
<b>Broadcast</b>	Days 1-3:	86%	84%
	Days 4-7:	<b>14%</b>	<b>16%</b>

# 60% of Broadcast's Top 25 Programs Have Playback Rates Above the Playback Average of 15%

## Top 25 Broadcast A18-49 Programs In Prime% Playback Minutes During Days 4-7

4-7 Day Broadcast Playback average = 15%

Prime A18-49 Rank	Net	Program Name	% of Playback Min In Days 4-7
1	CBS	BIG BANG THEORY, THE	13%
2	ABC	MODERN FAMILY	20%
3	ABC	HOW TO GET AWAY W/MURDER	15%
4	FOX	OT, THE	2%
5	FOX	FAMILY GUY	14%
6	NBC	VOICE	12%
7	ABC	SCANDAL	12%
8	NBC	BLACKLIST	18%
9	FOX	GOTHAM	23%
10	NBC	VOICE-TUE	16%
11	CBS	SCORPION	20%
12	ABC	GREY'S ANATOMY	14%
13	ABC	ONCE UPON A TIME	16%
14	CBS	CRIMINAL MINDS	22%
15	ABC	BLACK-ISH	17%
16	CBS	NCIS	18%
17	FOX	SIMPSONS	11%
18	NBC	CHICAGO FIRE	14%
19	CBS	SURVIVOR	10%
20	CBS	NCIS: NEW ORLEANS	23%
21	ABC	GOLDBERGS, THE	16%
22	FOX	BROOKLYN NINE-NINE	12%
23	ABC	MARVEL AGENTS S.H.I.E.L.D	24%
24	FOX	SLEEPY HOLLOW	20%
25	NBC	LAW AND ORDER:SVU	20%

## The Additional 4 Days of Playback Results in a Larger Increase in Broadcast's Ratings

A18-49 STD Ratings: Primetime

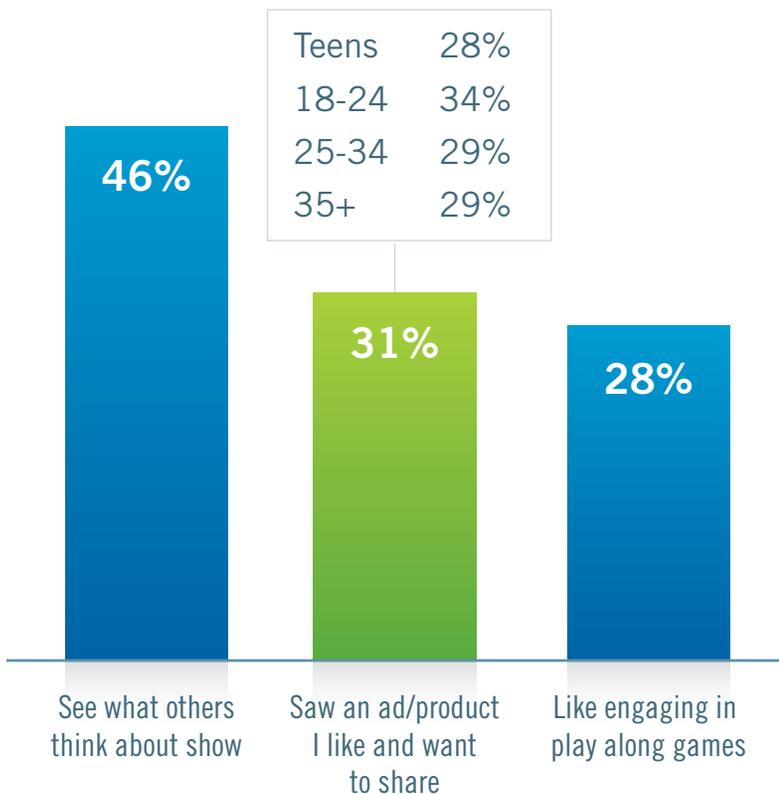
	Ad-Supp Cable	Broadcast
Live:	13.4%	7.5%
Live+3:	15.8%	10.5%
Live+7:	<b>16.1%</b> } +2%	<b>11.0%</b> } +5%



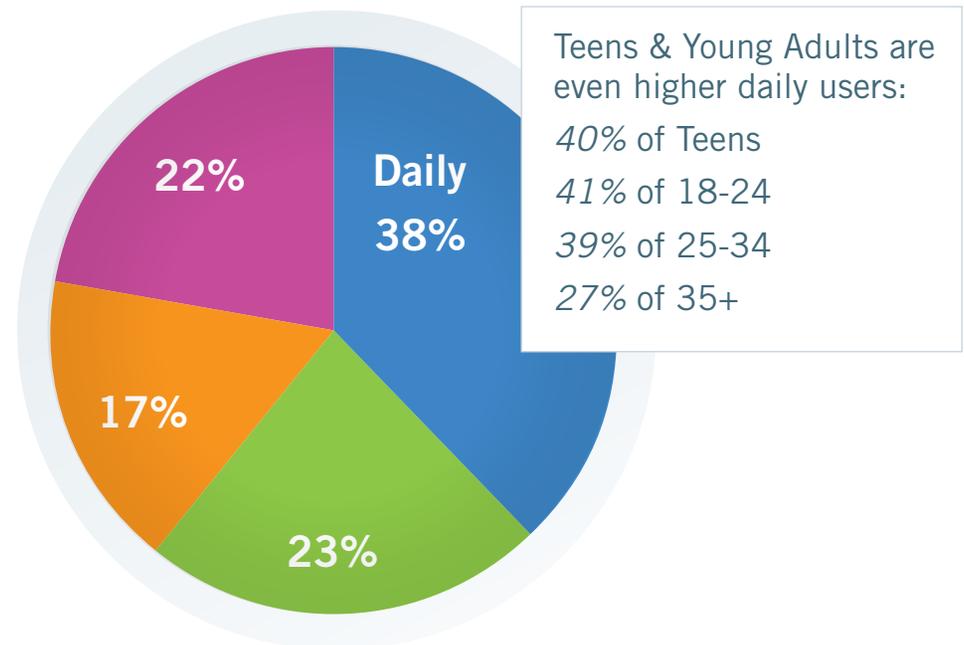
Source: Nielsen; DVR HHs; 9/22-10/26/14; Prime; Share of avg excludes sports/specials

# Social Media Encourages Viewers To Engage With Programs and Commercials While Watching

## Why Do You Post/ Tweet / Chat During a TV Show? (%) A18-49



## How Often Do you Chat / Post / Tweet About a Show While Watching TV? (A18-49)

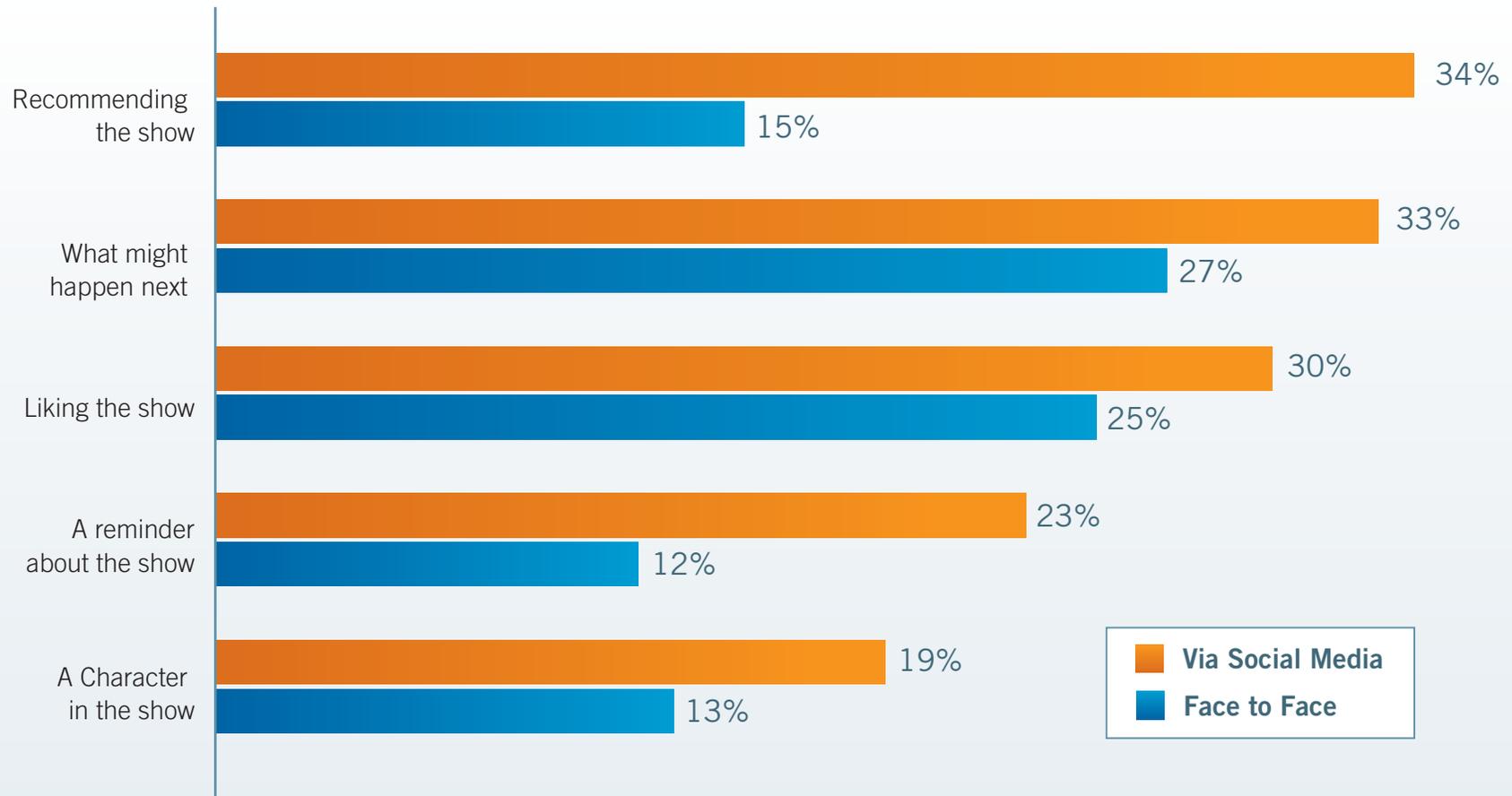


61% chat / post / tweet a few times a week or more

Source: CAB Video Nation 2013 report; BASE: Respondents who engage in Social TV

# Social Media Has A Significant Impact On Recommending, Reminding Others To View Programs While Viewing

Topic of conversation about how when communicating face to face vs. via Social Media while watching



Source: CRE Talking Social TV



# CableNation

CABLETELEVISION ADVERTISING BUREAU

If you would like additional video advertising information, insights or analysis please visit our website at [www.thecab.tv](http://www.thecab.tv) or feel free to contact us directly:

**Sean Cunningham**

President & CEO  
212-508-1223

[seanc@cabletvadbureau.com](mailto:seanc@cabletvadbureau.com)

**Danielle DeLauro**

SVP Strategic Sales Insights  
212-508-1239

[danielled@cabletvadbureau.com](mailto:danielled@cabletvadbureau.com)

**Jason Wiese**

VP Strategic Insights  
212-508-1219

[jasonw@cabletvadbureau.com](mailto:jasonw@cabletvadbureau.com)

**Evelyn Skurkovich**

Sr. Director, Strategic Insights  
212-508-1220

[evelyns@cabletvadbureau.com](mailto:evelyns@cabletvadbureau.com)

Follow us on  and like us on 