

# Time Shift Viewing - Setting the scene for 2012



# Agenda

- Overview of Time-shift
- DVR Usage in the US
- Time Shift Viewing - the Australian story

# Time Shifted Viewing – What is it ?



## Time-shifted Viewing is...



- The viewing of television broadcast programming at a later time than the live broadcast time
  - Playback of previously recorded programming
  - The pausing of a programme as it is broadcast live, and then continuing to watch it in playback

# What devices enable TSV?

- Any device connected to a TV set that allows for the recording and playback of television broadcasts
  - Personal Video Recorders (PVRs)
  - Digital Video Recorders (DVRs)
  - Video Tape Recorders (VCRs)
- Branded digital devices: MySky, MyFreeview, TiVo



# What is “Live” and “Playback”

## Live

- Viewing of television broadcast content as it is broadcast live. This is the basis of the current service.

## Playback

- *As Live* – viewing of recorded television broadcast content that occurs within the same research day (2am-2am) but is actually viewed at a different time to the original live broadcast time
- *Consolidated* – viewing of recorded television broadcast content up to 7 days after the live broadcast time.

# What will be measured?



- Only viewing taking place at standard speed playback will be included in total viewing
- “Trick” mode activity is excluded – pause, fast-forward, rewind.
- The viewing of playback content is measured, not the recording of that content

# How will it be measured?

- Nielsen TAM is deploying UNITAM – a state of the art metering solution
- UNITAM uses sophisticated audio matching technologies to measure all viewing on all TV sets in panel homes
- UNITAM offers a universal, independent and future-proof solution
- Proven solution – more than 30,000 audio matching peplemeters installed globally
- Currently installed in 10 markets, including Australia
  - South Africa scheduled for this year





# Time Shift Viewing USA

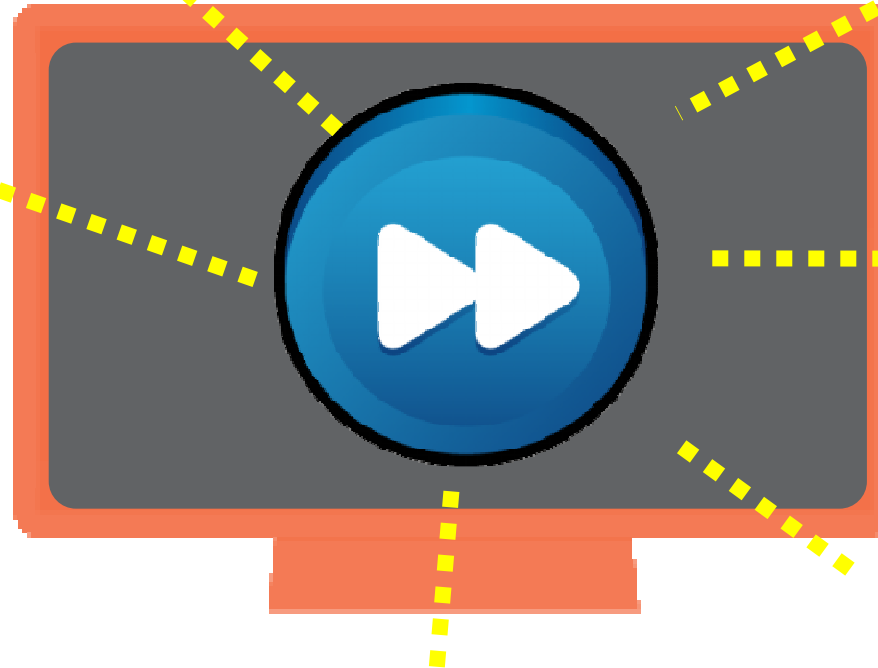


# PVR Usage in the US

- 38% of HH have PVRs

- Playback makes up 6% of total TV viewing

•PVR owners watch about 47% of all commercials recorded



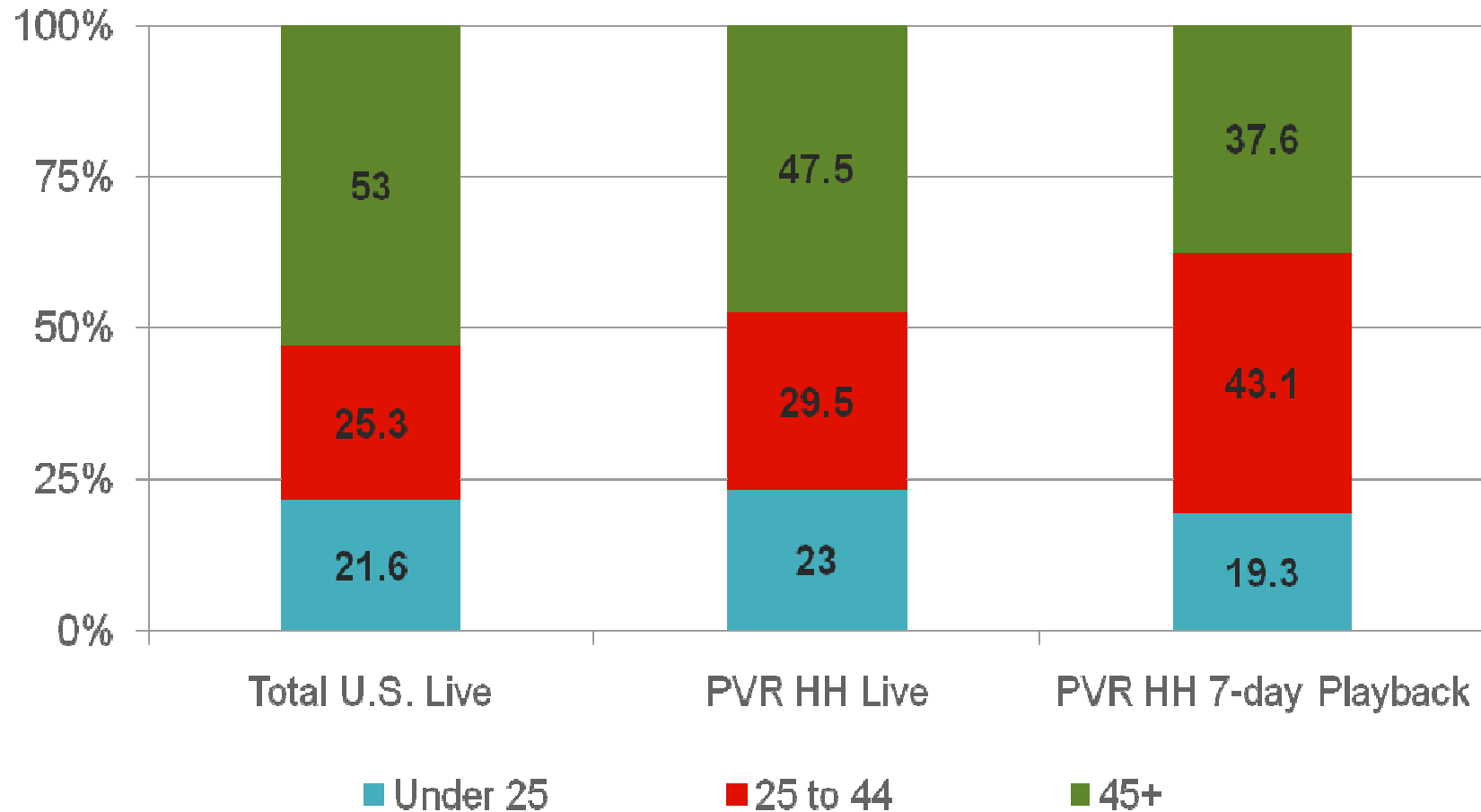
- PVR Playback Peaks between 9pm and 10pm

- The majority of PVR users are aged under 45

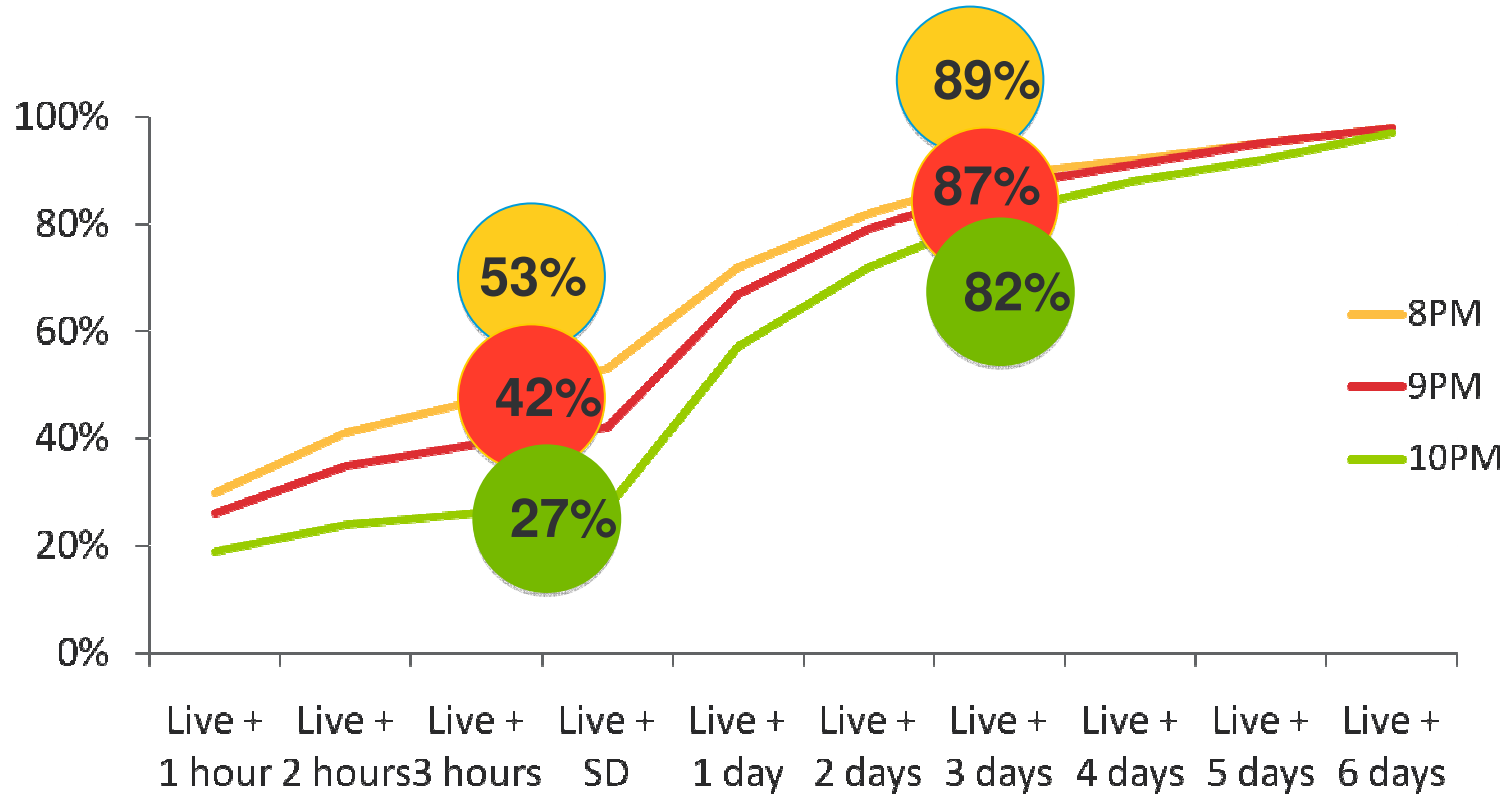
- Playback is higher in households that have had ownership of their PVR for longer

- Playback is more than 22 hours per month, representing 20% of the total TV viewing time *for those with PVRs*

# Viewing Audience Profiles - USA

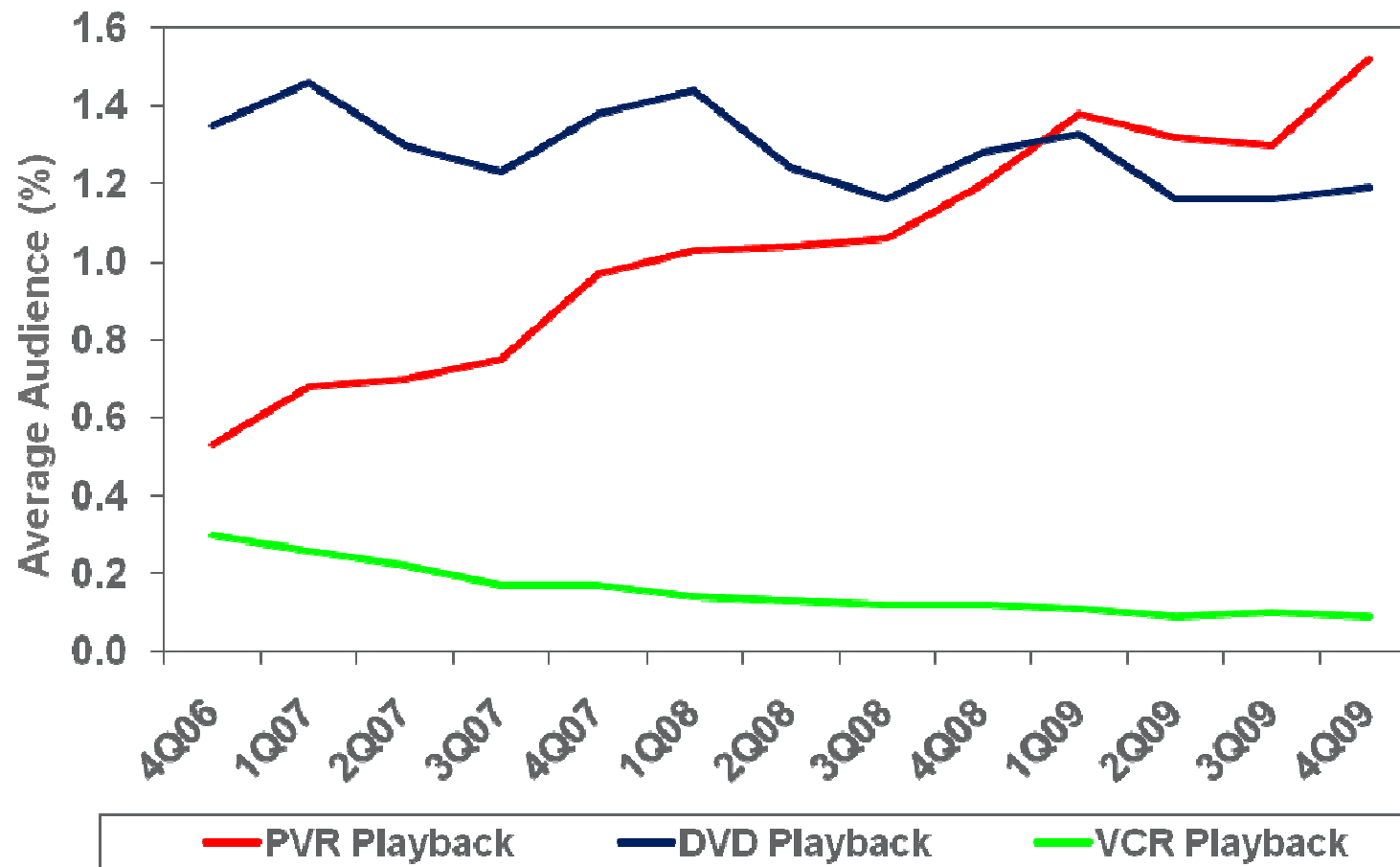


# Over 80% of prime time recording is played back within 3 days - US

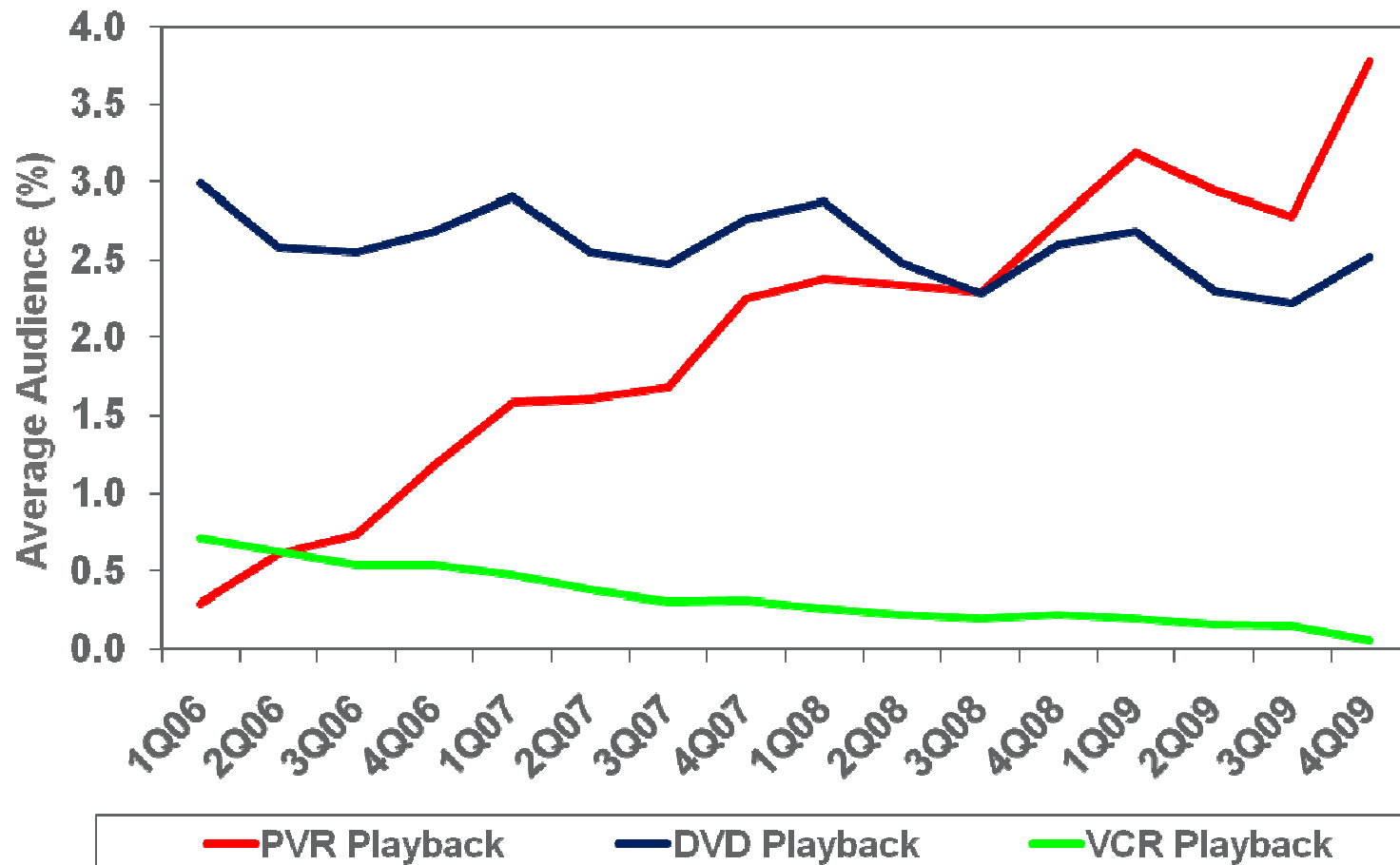


•Overall, 49% of prime time recording is played back within the same day

# Growth in US non-live viewing – All Day



# Growth in US non-live viewing: Peak 18-49



# Time Shift Viewing – the Australian experience



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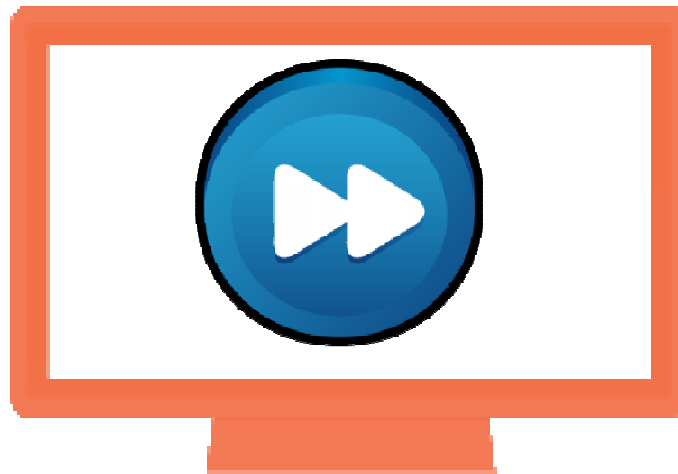
# Strong & consistent growth in PVR Households...

	Combined excl. WA	QLD	NNSW	SNSW	VIC	TAS
Q1	19.9%	19.1%	21.3%	22.9%	15.1%	20.0%
Q2	21.9%	19.7%	24.7%	23.6%	18.6%	20.9%
Q3	21.1%	19.0%	25.0%	22.3%	15.3%	22.1%
Q4	24.6%	24.9%	26.5%	25.0%	20.8%	23.8%

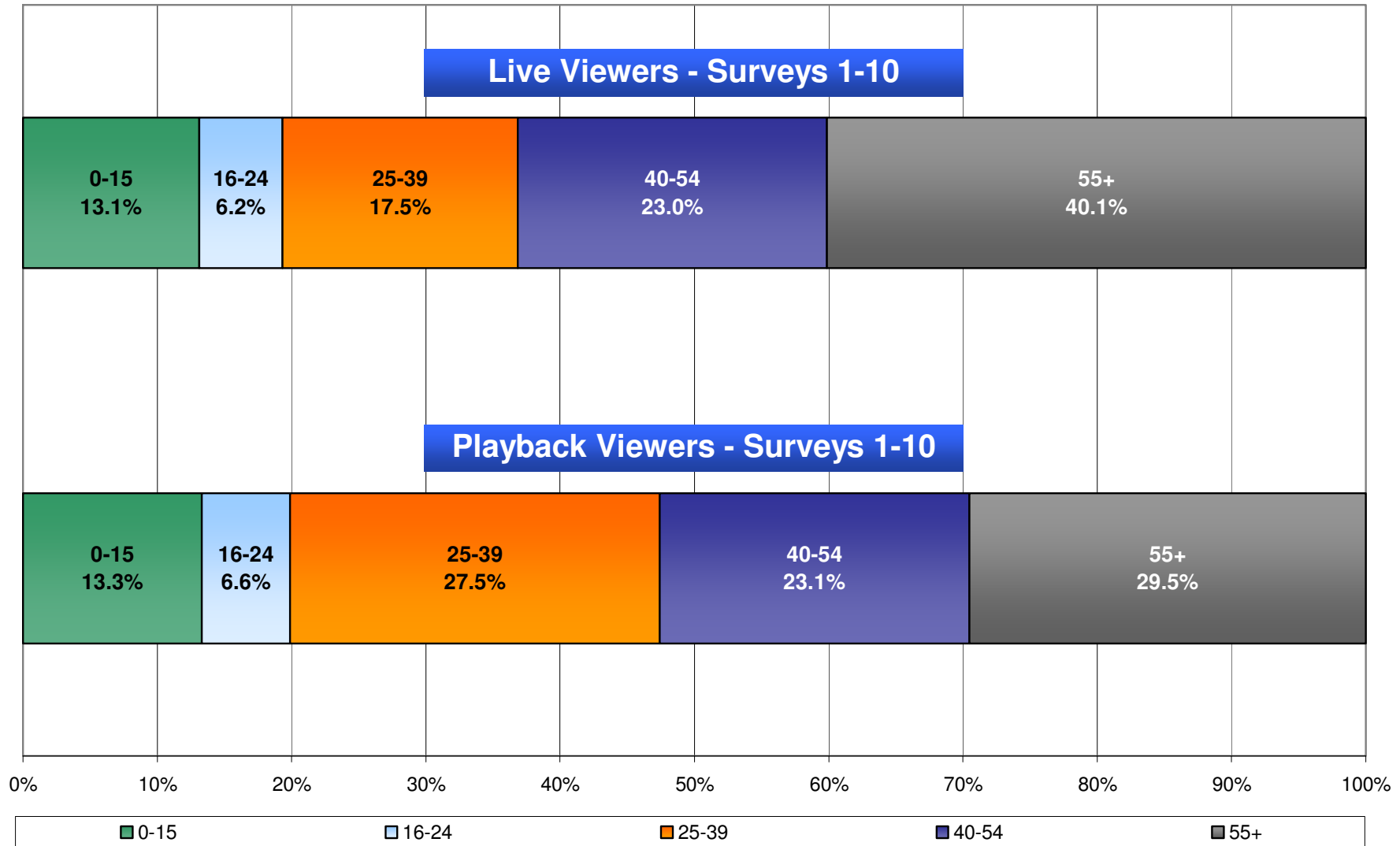
Source: Regional TAM Establishment Survey 2010

# Time Shift Viewing in Australia

- 98% of total viewing in 2010 was Live
- 80% of all playback occurs in 3 days
  - And over 90% occurs in 7 days

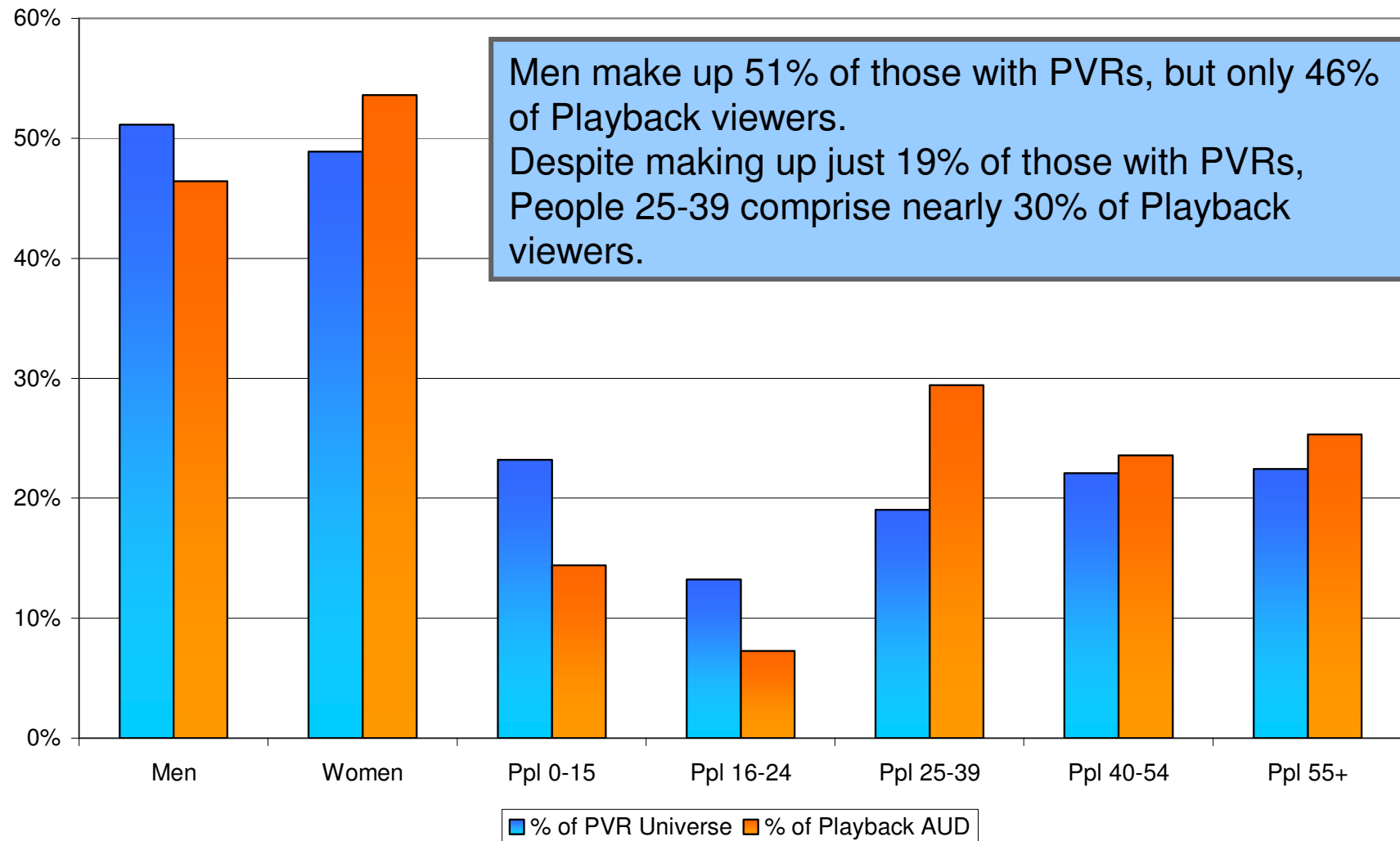


# Australian Viewing Profile



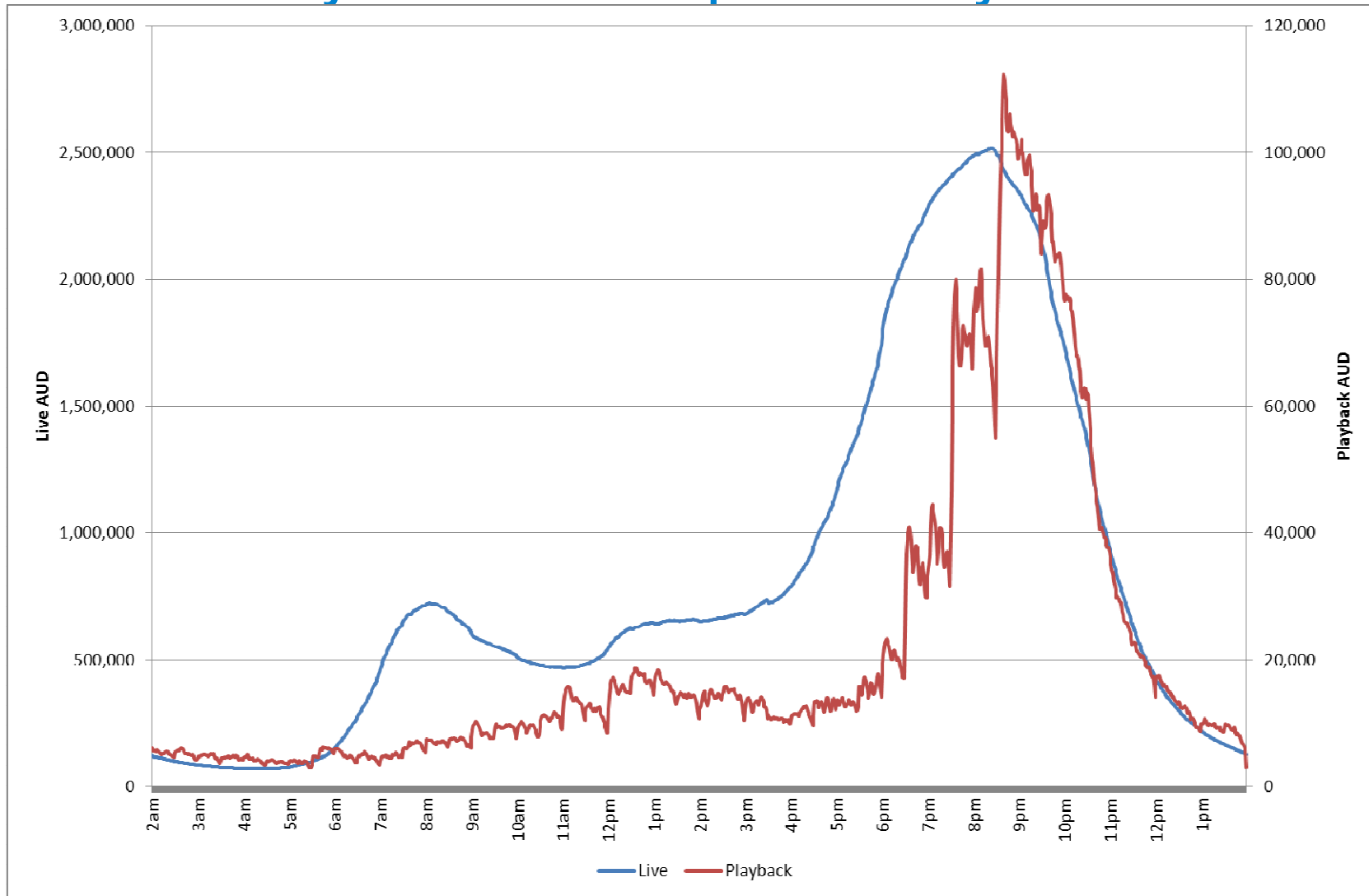
Source: Regional TAM, Environment: Regional STV, Surveys 1-10 (excl. Easter), 2010 Consolidated, Playback and Live, Combined Agg. Markets, Adhesion

# PVR Universe v Playback AUD



Source: Regional TAM, Environment: Regional FTA, Surveys 1-10 2010 (excl. Easter), 02:00-25:59, Consolidated, Combined Agg. Markets

# Live / Playback – Shape of Day



Source: Regional TAM, Environment: Regional FTA, Surveys 1-10 2010 (excl. Easter), 02:00-25:59, Consolidated, Combined Agg (excl Tas/WA)

# Playback by Genre

Typology	Playback %
Mini series	5.9%
Drama	5.0%
Reality Television	3.0%
Documentary	3.0%
Movies: feature films	2.3%
Comedy	2.2%
Cultural	1.8%
Other Sports	1.5%
Specials	1.5%
Other Program	1.5%
Light Entertainment	1.4%
Infotainment / Lifestyle	1.4%
Religious programs	1.4%
Sports Event	1.0%
Children's programs	0.9%
Special Sports Event	0.6%
News/Current Affairs	0.5%

Source: Regional TAM Environment: Regional FTA, Surveys 1-10 (excl. Easter)) Consolidated, Playback AUD, 02:00-25:59, Total Individuals

# Summary

- US Market
  - 38% of Households have a PVR
  - 6% of total viewing is playback
  - 25 to 44 strong in playback audience
  - Over 80% of playback occurs within 3 days
- Australian Market (Regional TAM)
  - 25% of Households have a PVR
  - 2% of total viewing is playback
  - 25 to 39 strong in playback audience
  - Over 80% of playback occurring within 3 days