

State of the Media

TV Usage Trends: Q3 and Q4 2010

Overall timeshifting by U.S. TV audiences increased significantly in the third and fourth quarter of 2010, with the average American watching nearly 10 and a half hours of timeshifted TV per month at the end of 2010. The biggest year-over-year increase was in the third quarter, when timeshifting increased 17.9% over the same period in 2009, compared to 13.4% in the fourth quarter.

These overall increases in timeshifting are not driven by more DVR viewing per home but by more homes using DVRs. During the fourth quarter, the average person in a DVR home watched nearly 26 hours of timeshifted television per month, a year-over-year increase of 19 minutes.

Partially as a consequence of higher DVR usage, the average American watched more than 154 hours of television per month in the 4th Quarter, an increase of 18 minutes. The biggest impact of DVR viewing is felt among 25-64-year-old viewers, who watch more than 30 hours a month of DVR playback. In the 3rd Quarter of 2010, which includes the traditionally slow summer months, the average viewer watched 145 hours of television, an hour and half more than the year before.



Table 1a: A Week in the Life—Weekly Time Spent in Hours:Minutes—By Age Demographic Q3 2010

Q3	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+	Hispanic 2+	African American 2+
On Traditional TV*	26:12	25:34	25:01	29:05	32:01	39:10	44:23	32:35	28:59	45:30
Watching Timeshifted TV*	1:41	1:35	1:28	2:51	2:40	2:27	1:23	2:08	1:22	1:34

Source: The Nielsen Company. Based on the Total Population in the U.S.—all 295 million Americans over age 2—whether or not they have the technology.

Table 1b: A Week in the Life—Weekly Time Spent in Hours:Minutes—By Age Demographic Q4 2010

Q4	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+	Hispanic 2+	African American 2+
On Traditional TV*	25:29	23:41	26:56	30:51	35:16	43:00	47:33	34:39	29:48	47:08
Watching Timeshifted TV*	1:40	1:31	1:32	3:04	3:08	2:47	1:38	2:21	1:28	1:43

Source: The Nielsen Company. Based on the Total Population in the U.S.—all 297 million Americans over age 2—whether or not they have the technology.

**Table 2a: Overall Usage—Number of Users 2+ (in 000's)
Monthly Reach—Q3 2010**

Q3	Q3 10	Q2 10	Q3 09	% Diff Yr to Yr
On Traditional TV°	286,326	286,648	283,323	1.06%
Watching Timeshifted TV° (all TV homes)	101,126	97,914	86,204	17.31%

Source: The Nielsen Company.

**Table 2b: Overall Usage—Number of Users 2+ (in 000's)
Monthly Reach—Q4 2010**

Q4	Q4 10	Q3 10	Q4 09	% Diff Yr to Yr
On Traditional TV°	289,284	286,326	286,945	0.82%
Watching Timeshifted TV° (all TV homes)	105,936	101,126	90,768	16.71%

Source: The Nielsen Company.

Table 3a: Monthly Time Spent in Hours:Minutes Per User 2+

Q3	Q3 10	Q2 10	Q3 09	% Diff Yr to Yr	Hrs:Min Diff Yr to Yr
On Traditional TV*	145:28	143:37	143:56	1.1%	1:32
Watching Timeshifted TV* (all TV homes)	9:32	9:27	8:05	17.9%	1:27
DVR Playback (only in homes with DVRs)	23:58	24:27	23:23	2.5%	0:35

Source: The Nielsen Company. Based on Total Users of each Media. TV viewing patterns in the U.S. tend to be seasonal, with TV usage higher in the winter months and lower in the summer months, sometimes leading to a decline in quarter to quarter usage.

Table 3b: Monthly Time Spent in Hours:Minutes Per User 2+

Q4	Q4 10	Q3 10	Q4 09	% Diff Yr to Yr	Hrs:Min Diff Yr to Yr
On Traditional TV*	154:05	145:28	153:47	0.2%	0:18
Watching Timeshifted TV* (all TV homes)	10:27	9:32	9:13	13.4%	1:14
DVR Playback (only in homes with DVRs)	25:52	23:58	25:33	1.2%	0:19

Source: The Nielsen Company. Based on Total Users of each Media. TV viewing patterns in the U.S. tend to be seasonal, with TV usage higher in the winter months and lower in the summer months, sometimes leading to a decline in quarter to quarter usage.

Table 4a: Monthly Time Spent in Hours:Minutes–Age Demographic–Q3 2010

Q3	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV*	116:17	113:52	116:49	130:27	141:57	173:01	197:48	145:28
Watching Timeshifted TV (all TV homes)	7:29	7:05	6:55	12:47	11:49	10:51	6:10	9:32
DVR Playback (only in homes with DVRs)	17:30	17:41	18:37	28:40	26:44	27:32	23:24	23:58

Source: The Nielsen Company. Based on Total Users of each Media. Traditional TV and Timeshifted TV viewing estimates are based on persons in TV Households (293 million) DVR Playback viewing estimates are based on persons in DVR Households (114 million).

Table 4b: Monthly Time Spent in Hours:Minutes–Age Demographic–Q4 2010

Q4	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV*	112:46	105:07	124:29	137:55	156:01	189:22	210:34	154:05
Watching Timeshifted TV (all TV homes)	7:22	6:44	7:08	13:44	13:52	12:17	7:14	10:27
DVR Playback (only in homes with DVRs)	17:06	16:04	18:44	30:59	30:16	30:37	26:22	25:52

Source: The Nielsen Company. Based on Total Users of each Media. Traditional TV and Timeshifted TV viewing estimates are based on persons in TV Households (295 million) DVR Playback viewing estimates are based on persons in DVR Households (118 million).

Table 5a: Video Audience Composition–Age Demographic–Q3 2010

Q3	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	F2+	M2+
On TV*	11%	7%	8%	12%	21%	23%	18%	54%	46%

Source: The Nielsen Company. Based on Total Users of each Media.

Table 5b: Video Audience Composition–Age Demographic–Q4 2010

Q4	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	F2+	M2+
On TV*	10%	6%	8%	12%	22%	24%	18%	53%	47%

Source: The Nielsen Company. Based on Total Users of each Media.

Table 6a: TV Audience Composition
Monthly Time Spent By Gender—Q3 2010

Q3	M2-17	F2-17	M18-49	F18-49	M 50+	F 50+
On TV*	114:07	116:42	126:54	139:21	170:58	193:19

Source: The Nielsen Company. Based on Total Users of each Media.

Table 6b: TV Audience Composition
Monthly Time Spent By Gender—Q4 2010

Q4	M2-17	F2-17	M18-49	F18-49	M 50+	F 50+
On TV*	110:12	109:33	139:20	148:12	187:40	205:39

Source: The Nielsen Company. Based on Total Users of each Media.

Table 7a: TV Audience Composition
Monthly Time Spent in Hours: Minutes
Ethnicity & Race—Q3 2010

Q3	White	Black	Hispanic	Asian
On Traditional TV*	140:22	202:56	128:04	96:26
Watching Timeshifted TV (all TV homes)	10:36	7:03	6:03	6:48
DVR Playback (only in homes with DVRs)	24:48	21:38	21:53	19:50

Source: The Nielsen Company. Based on Total Users of each Media.

Table 7b: TV Audience Composition
Monthly Time Spent in Hours: Minutes
Ethnicity & Race—Q4 2010

Q4	White	Black	Hispanic	Asian
On Traditional TV*	139:32	211:08	131:24	96:36
Watching Timeshifted TV (all TV homes)	10:32	7:41	6:28	6:49
DVR Playback (only in homes with DVRs)	25:27	23:00	22:58	19:17

Source: The Nielsen Company. Based on Total Users of each Media.

Table 8a: Delivery Systems—Q3 2010

Q3	White	Black	Hispanic	Asian
Satellite	30.8%	26.9%	35.3%	25.3%
Broadcast Only	8.6%	11.0%	14.6%	11.6%
Wired Cable	61.2%	63.3%	51.3%	65.5%

Source: The Nielsen Company. Based on NPM scaled installed counts during 3Q10.
Note: Wired Cable includes both Cable and Telco providers.

Table 8b: Delivery Systems—Q4 2010

Q4	White	Black	Hispanic	Asian
Satellite	30.7%	27.2%	35.4%	26.0%
Broadcast Only	8.7%	11.2%	15.3%	10.7%
Wired Cable	61.2%	62.4%	50.4%	65.6%

Source: The Nielsen Company. Based on NPM scaled installed counts during 4Q10
Note: Wired Cable includes both Cable and Telco providers.

° TV in the home includes those viewing at least one minute (reach) within the measurement period. This includes Live viewing plus any playback within the measurement period; Timeshifted TV is playback primarily on a DVR but includes playback from VOD, DVD recorders, server based DVR's and services like Start Over.

* TV in the home includes Live usage plus any playback viewing within the measurement period. Timeshifted TV is playback primarily on a DVR but includes playback from VOD, DVD recorders, server based DVR's and services like Start Over.

Note: 3Q data was run on dates 6/28/10 - 9/26/10. 4Q data was run on dates 9/27/10 - 12/26/10.
3/15/11