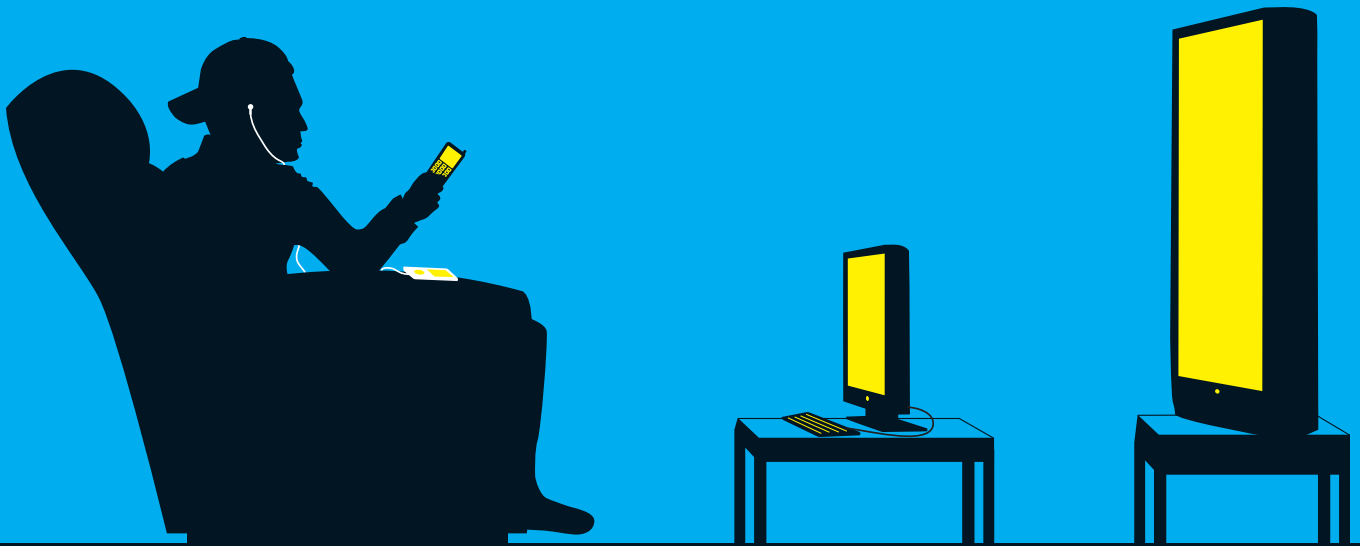


Television,
Internet and
Mobile Usage
in the U.S.



A2/M2 Three Screen Report

1st Quarter 2009

nielsen
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Americans may consume video on the “best screen available” yet consumers' time with TV, Internet and Mobile video keeps on increasing. The recent results of Nielsen's Three Screen Report—a regular analysis from Nielsen's Anywhere Anytime Media Measurement initiative (A2/M2)—show that the average American every month watches approximately 153 hours of TV at home. In addition, the 131 million Americans who watch video on the Internet watch on average about 3 hours of video online each month at home or work. The 13.4 million Americans who watch video on mobile phones watch on average about 3 ½ hours of mobile video each month.

The TV and Internet figures in this report are calculated using Nielsen's National TV and Internet panels, which are measured electronically and reported on a regular basis. The Mobile Phone figures are collected by Nielsen via a quarterly survey and give a firsthand look at how early adopters self-report their usage of mobile video.

Table 1

Overall Usage Number of Users 2+ (in 000's) – Monthly Reach				
	1Q09	4Q08	1Q08	% Diff Yr to Yr
Watching TV in the home ^o	284,574	285,313	281,106	1.2%
Watching Timeshifted TV ^o	79,533	73,934	57,934	37.3%
Using the Internet ^{**}	163,110	161,525	158,002	3.2%
Watching Video on Internet ^{**}	131,102	123,195	115,970	13.0%
Using a Mobile Phone [^]	230,436	228,920	219,619	4.9%
Mobile Subscribers Watching Video on a Mobile Phone [^]	13,419	11,198	8,817	52.2%

Source: The Nielsen Company

Table 2

Monthly Time Spent in Hours:Minutes Per User 2+					
	1Q09	4Q08	1Q08	% Diff Yr to Yr (1Q09 to 1Q08)	Absolute Diff Yr to Yr (1Q09 to 1Q08)
Watching TV in the home [*]	153:27	151:03	150:38	1.9%	2:49
Watching Timeshifted TV [*]	8:13	7:11	5:52	40.1%	2:21
Using the Internet ^{**}	29:15	27:04	27:57	4.6%	1:17
Watching Video on Internet ^{**}	3:00	2:53	1:57	53.2%	1:02
Mobile Subscribers Watching Video on a Mobile Phone [^]	3:37	3:42	n/a	n/a	n/a

Source: The Nielsen Company

Table 3

Monthly Time Spent in Hours:Minutes 1Q 2009								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On Traditional TV*	108:45	104:24	116:47	144:09	151:52	175:42	195:01	210:52
Watching Timeshifted TV*	5:50	5:06	5:47	12:12	11:19	9:40	9:14	4:28
Using the Internet**	5:21	11:32	14:19	31:37	42:35	39:27	35:49	28:34
Watching Video on Internet**	1:45	2:50	5:07	4:32	3:29	2:45	1:44	1:22
Mobile Subscribers Watching Video on a Mobile Phone [^]	n/a ^{^^}	6:30 ^{^^}	2:53	3:37	3:15	3:15	2:10	n/a ^{oo}

Source: The Nielsen Company

Table 4

Video Audience Composition – Age 1Q 2009								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On TV*	10%	6%	7%	13%	14%	17%	15%	18%
On the Internet**	8%	8%	7%	15%	18%	22%	15%	7%
On Mobile Phones [^]	n/a ^{^^}	18 ^{^^}	10%	34%	20%	11%	6%	1%

Source: The Nielsen Company

Table 5

Video Audience Composition – Gender 1Q 2009		
	F2+	M2+
On TV*	54%	46%
On the Internet**	53%	47%
On Mobile Phones ^{^^}	41%	59%

Source: The Nielsen Company

FOOTNOTES FOR CHARTS ABOVE:

- ^o TV in the Home includes those viewing at least one minute within the measurement period. This includes Live viewing plus any playback within 7 day; Timeshifted TV is playback primarily on a DVR but including playback on services like Start Over as well as playback from a DVD recorder.
- * TV in the Home includes Live viewing plus any playback viewing within 7 days. Timeshifted TV is playback primarily on a DVR but including playback services like Start Over as well as playback from a DVD recorder.
- ** Internet figures are from home and work. Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are monthly averages over the course of the quarter.
- [^] The average monthly unique users of mobile phones and mobile video in 1Q 2009 and 4Q 2008, based on Nielsen Mobile surveys and CTIA projection of U.S. wireless subscriptions. Video user projection, time spent and composition data based on survey analysis of past 30 day use during the period. The mobile video audience figures in this report for 1Q 2009 and 4Q 2008 include mobile phone users who access mobile video through any means (including mobile Web, subscription-based, downloads and applications). Projection of all subscribers is based on persons 2+. Projection of mobile video viewers, and all other mobile video estimates, based on subscribers 13+.
- ^{^^} Nielsen Mobile's survey reports mobile video usage for those users 13 and older. Thus, 12-17 is T13-17 for all mobile data.
- ^{oo} A65+ base size too small to report mobile video hours:minutes

Key Facts

- Television is still the dominant choice for Americans who watch video. Almost 99% of the video watched in the U.S. is still done on television.
- Traditional TV usage in the U.S. remains at an all-time high at approximately 153 hrs a month. Of all demographics, adults age 18-24 show signs of using DVRs and online video about the same amount of time – they timeshift television 5hrs, 47min per month, and video on the Internet 5hrs, 3min each month.
- During the first quarter, the growth of online video was driven by both strong brand marketing and large media events including the Presidential inauguration, the Super Bowl and March Madness.
- Teens age 13-17 continue to be avid viewers of mobile video; they report viewing an average of 6.5 hours of video on their mobile phones each month.

Trends to Watch

- Timeshifting usage with DVRs is up 40% from last year, with Americans playing back 8 hrs, 13 minutes per month. This increase is likely larger than usual, due to the 2008 writers strike and the absence of original scripted programming during 1Q08.
- With broadband levels increasing in the U.S., online video audiences will continue to grow as consumers begin to upgrade their PCs to support increased video consumption. Growth also hinges on how broadband channels promote themselves. As sites continue to aggressively market themselves, they'll increase the levels of growth by creating demand.
- Mobile video viewing has grown a significant 52% in Q1 2009 from the previous year, up to over 13 million Americans. The most watched categories on mobile phones are comedy and weather.

This is a quarterly report published by
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