



CABLE NATION: Fast-Forward To DVR Facts

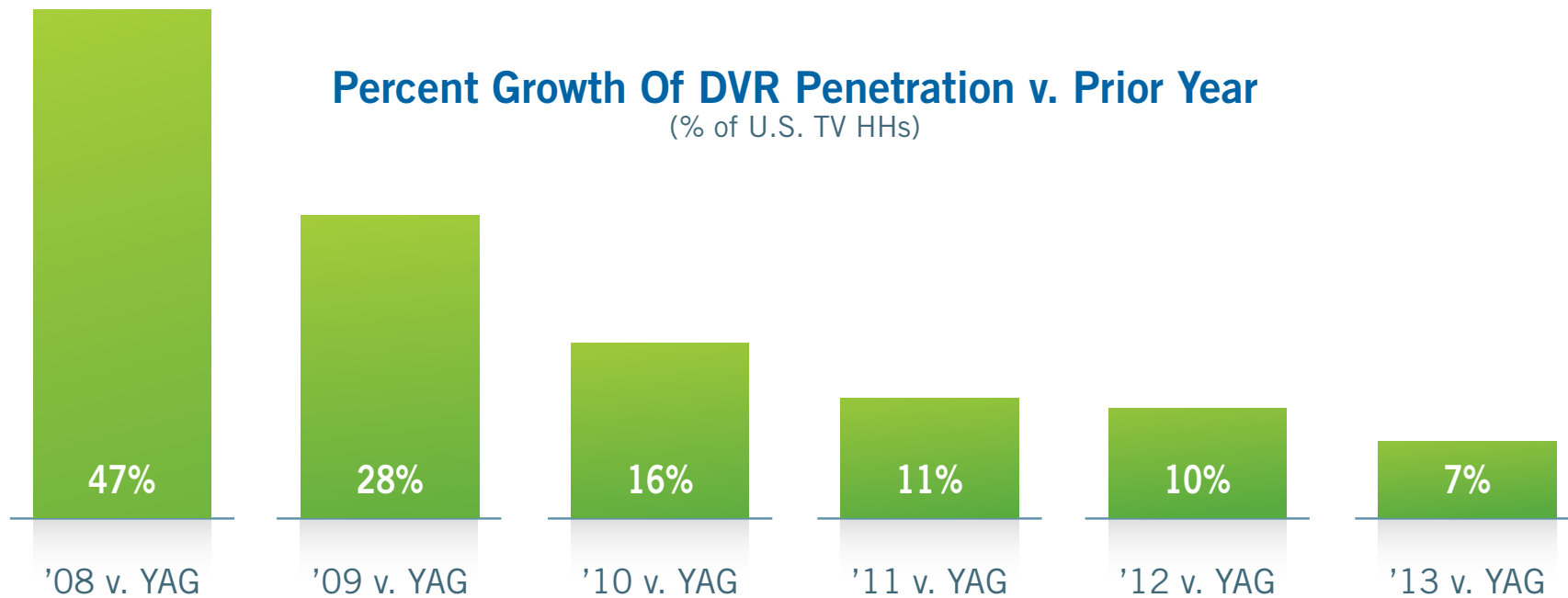
Fast-Forward To DVR Facts

- Now at 48%, DVR penetration is decelerating and nearing its maturity
- DVR homes spent 15% more time viewing in Primetime than non-DVR homes
- ‘Live TV’ still the norm as 77% of viewing occurs ‘Live’ in Primetime – among all demographics
- Playback peaks in Primetime and Late Night
- Less than a quarter of Cable’s programming is time-shifted in primetime
 - Half of Broadcasts’ programming is time-shifted with mostly highest rated programming viewed in playback mode
- Locally, time spent in DVR playback is less than 10% of total TV time
- Social media encourages viewers to engage with commercials. 31% of A18-49 tweet/post/chat about an ad/product they saw on TV

DVR Penetration Is At 48%; One in Two Households Do Not Own A DVR

DVR Penetration	'08	'09	'10	'11	'12	'13
	25%	32%	37%	41%	45%	48%

DVR Growth Is Slowing and Nearing Its Maturity

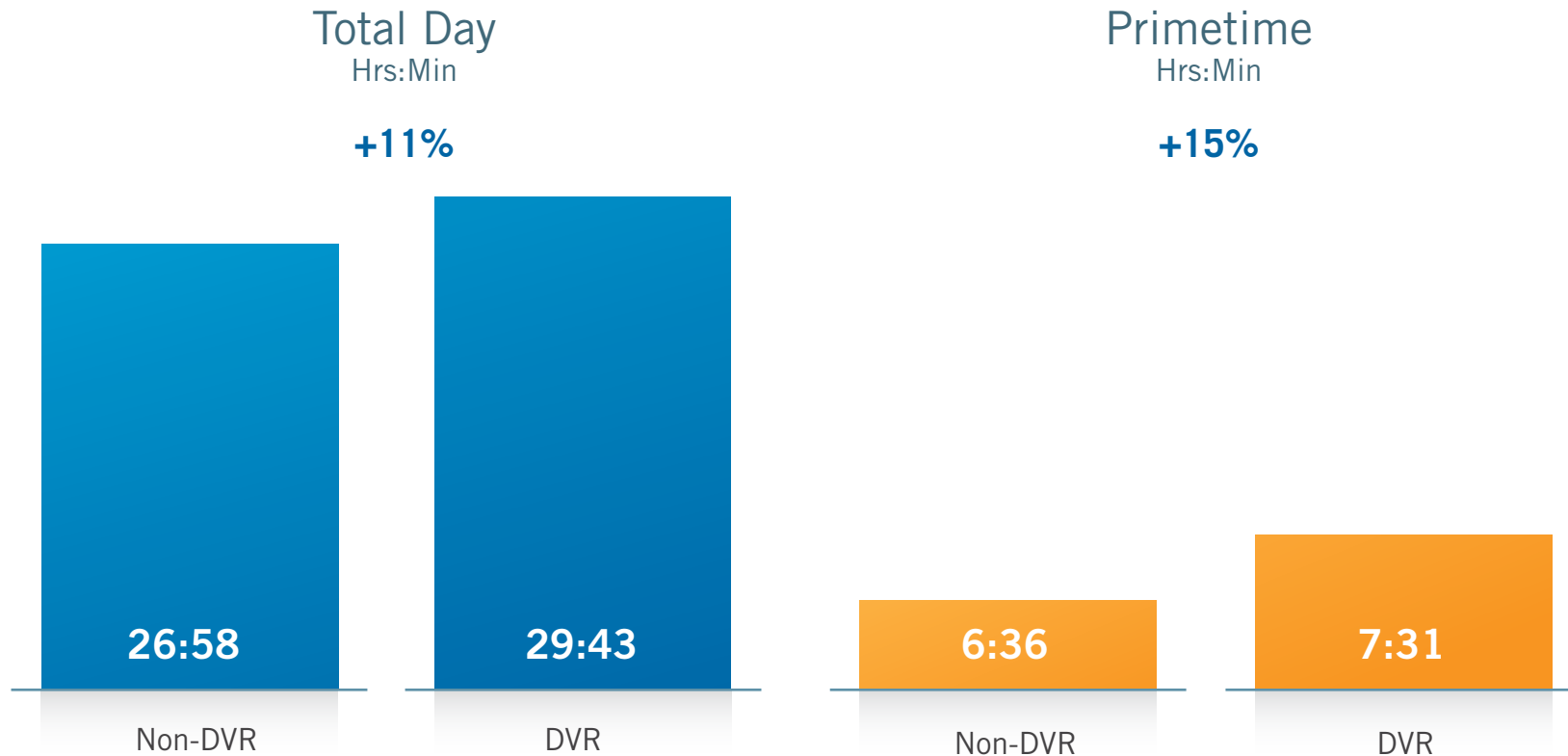


Source: CAB Analysis of Nielsen data; May of each year.

DVR Homes Are Heavier Consumers of Television

DVR households spend 15% more time viewing TV during primetime than non-DVR homes

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



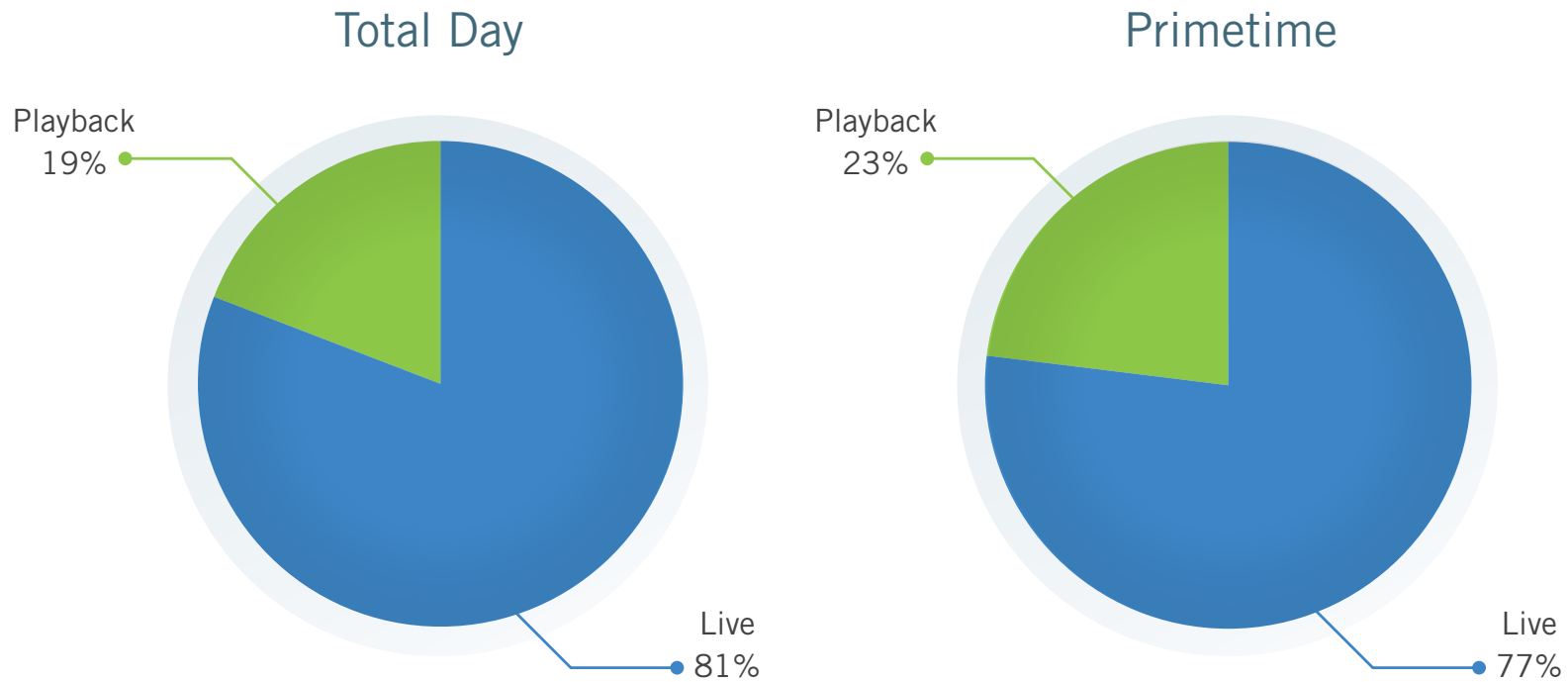
Source: CAB Analysis of Nielsen NPower Live+7 Put; % change of time spent of dvr v non-dvr hh; Prime=M-Sa 8-11&Su 7-11p; M-Su 6a-6a; 4/29-5/26/13

‘Live TV’ Still The Norm, 77% Of Primetime Minutes Are Viewed ‘Live’

In Total Day, more than 8 out of 10 minutes are viewed “live”

Share of Time Spent With Playback v Live Minutes

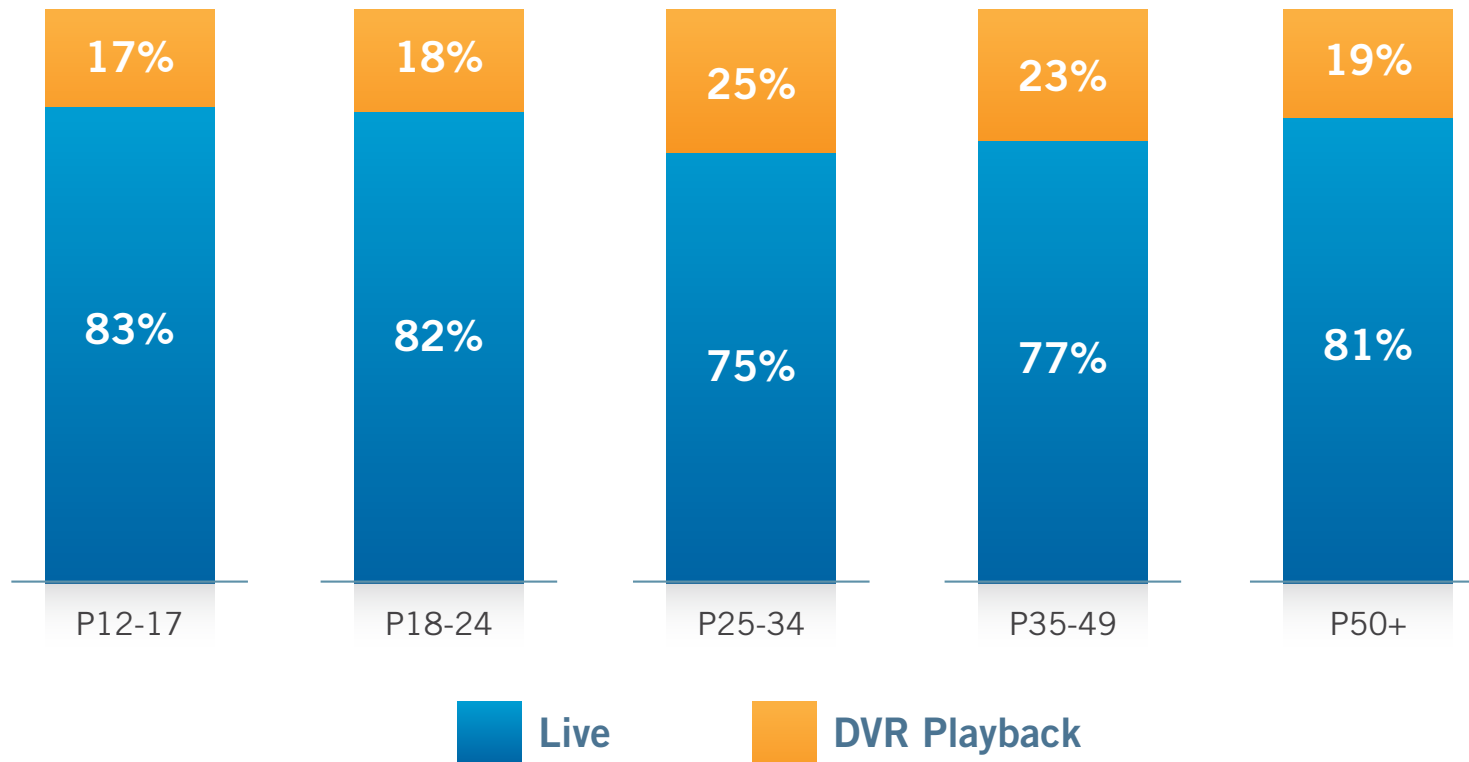
A18-49/ May 2013



Source: CAB Analysis of Nielsen NPower; base= DVR; share of avg minutes viewed; 4/29-5/26/13

All Age Groups – Young & Old – Watch Vast Majority Of Their TV Programming ‘Live’

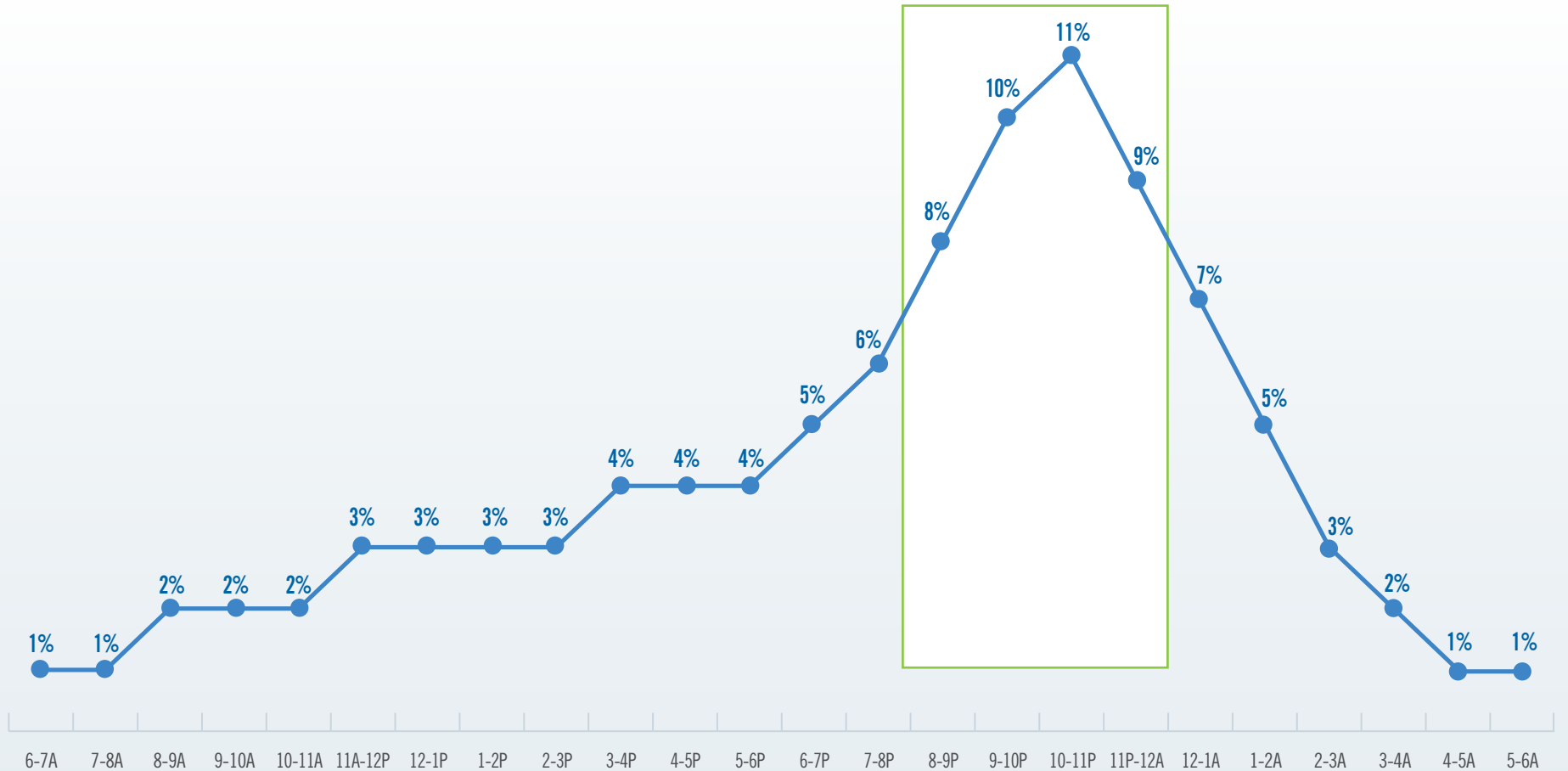
Share of Time Spent With Playback v Live Minutes
(Primetime: May 2013)



Source: CAB Analysis of Nielsen NPower; base= DVR; share of avg minutes viewed; 4/29-5/26/13

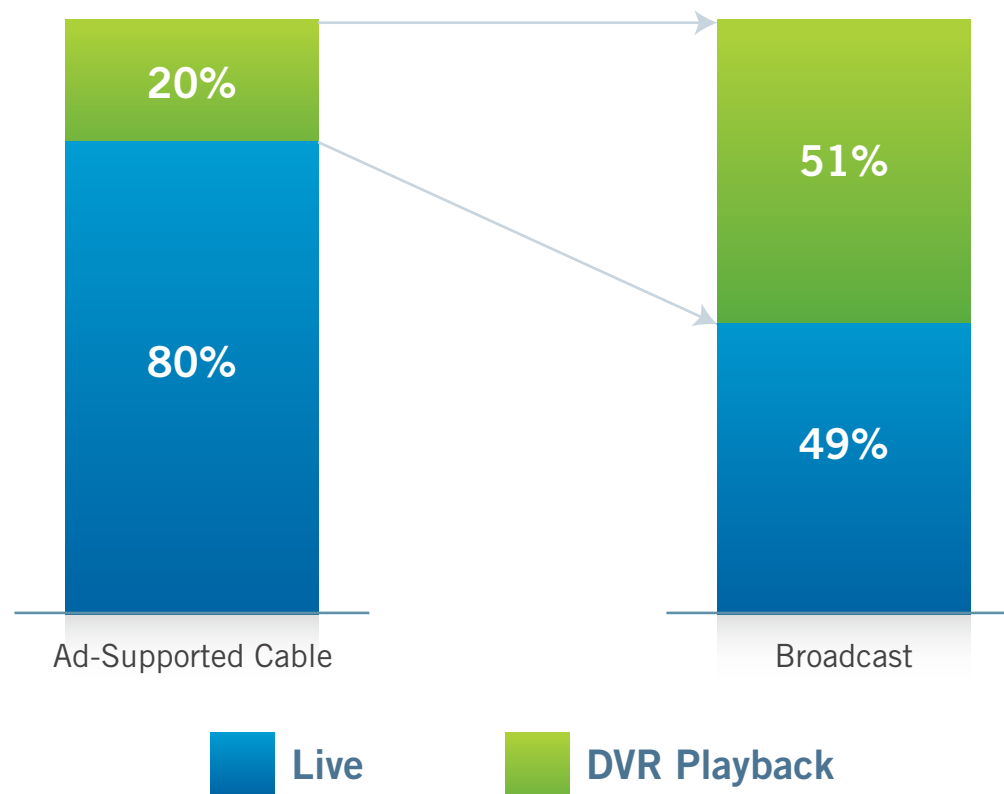
Majority Of Playback Occurs During Primetime and Extends Into Late Night

Share of Avg Minutes Viewed in DVR Playback by Hour – May 2013














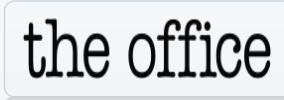



Less Than A Quarter Of Cable's Primetime Minutes Are Time-Shifted v. Half Of Broadcasts'

Share of Time Spent With Playback v Live Minutes
A18-49/ May 2013



Broadcasts' Premium Priced, Highest Rated Programs Tend To Be The Most Time-Shifted

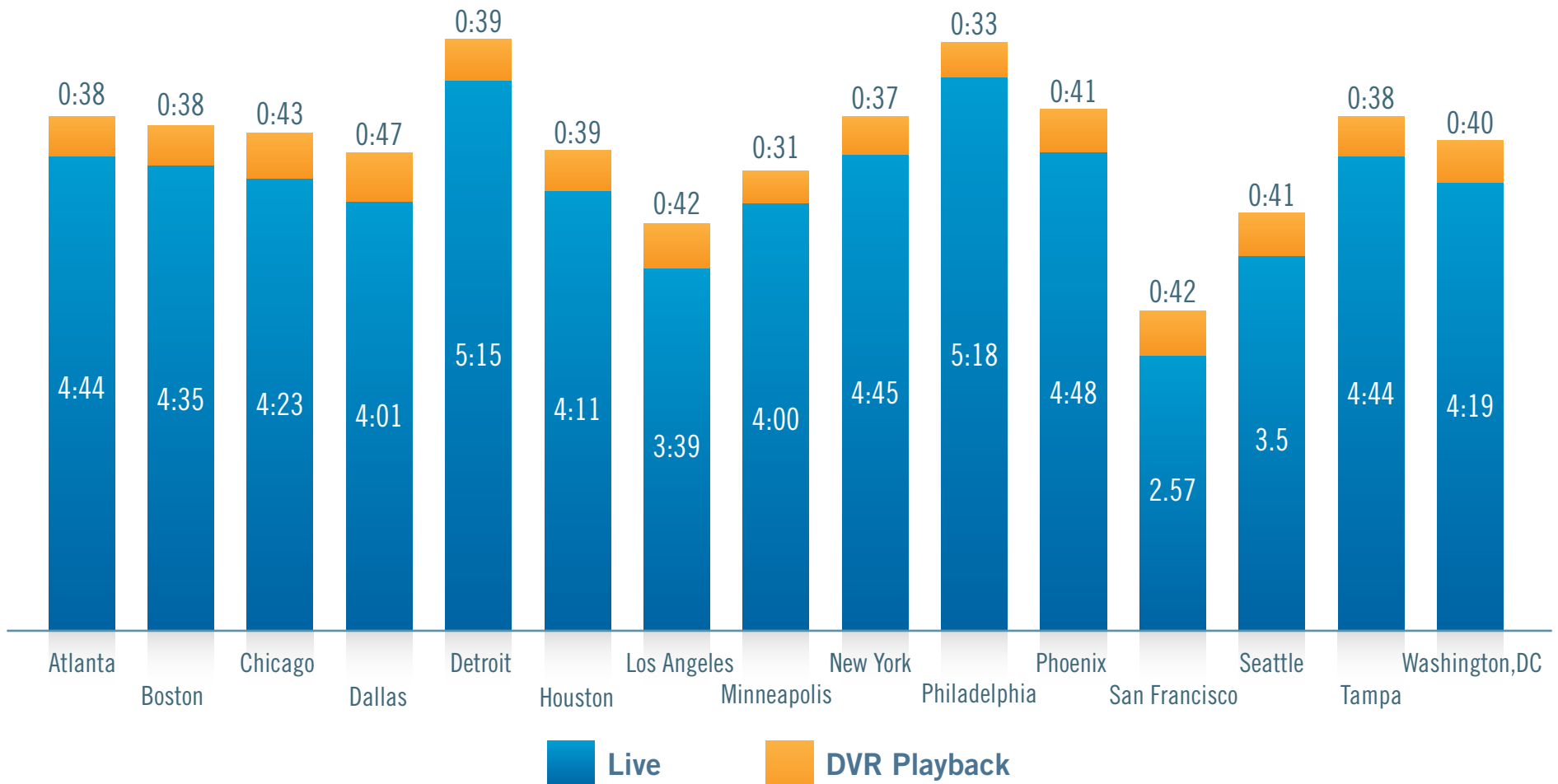
Top 15 Most Time-Shifted Broadcast Programs, Primetime/May 2013

Timeshifted Rank	Program	A18-49 Total Rank
1		2 nd Rank
2		1 st Rank
3		3 rd Rank
4		8 th Rank
5		13 th Rank
6		6 th Rank
7		9 th Rank
8		15 th Rank
9		4 th Rank
10		16 th Rank
11		11 th Rank
12		19 th Rank
13		7 th Rank
14		5 th Rank
15		21 st Rank

Source: CAB analysis of Nielsen Playback AA% (ranked on playback A18-49 AA%); Primetime; 4/29-5/26/13; Total A18-49 rank is based on all TV homes.

Locally, Time Spent In DVR Playback Is Minimal - Comprising Less Than 10% of Total TV Time

Average Time Spent Daily In Top 15 Markets (Hrs:Min)

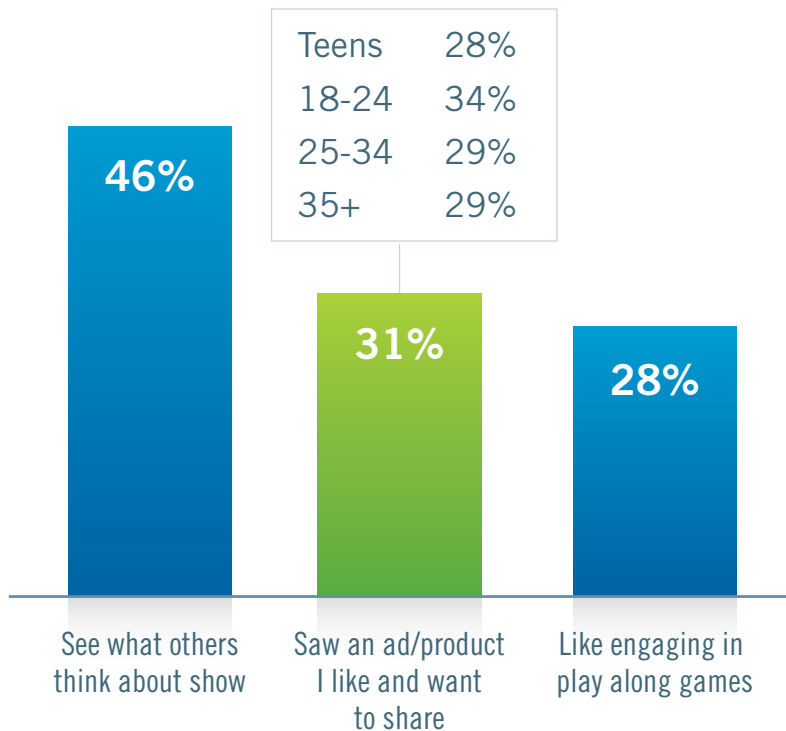


Source: Nielsen Local Watch report 5/13; data on 2/13 , P25-54

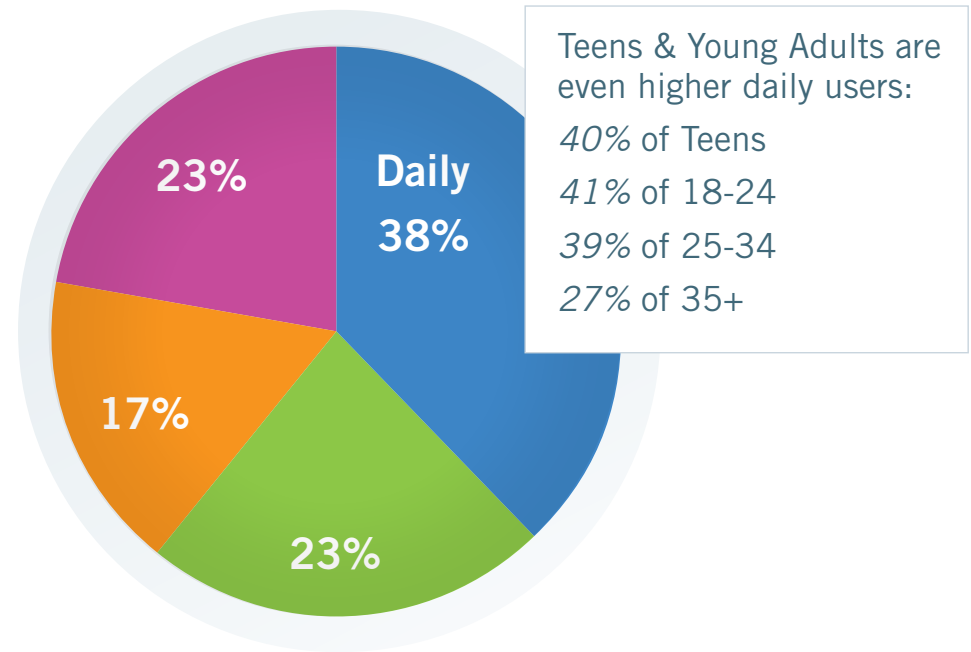
Social Media Is Encouraging Viewers To Engage With Commercials Rather Than Fast Forward

Younger people are more likely to let commercials play as engage with Social TV on other screens; they may be responding to a poll and/or chatting with friends about program.

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



CableNation

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

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