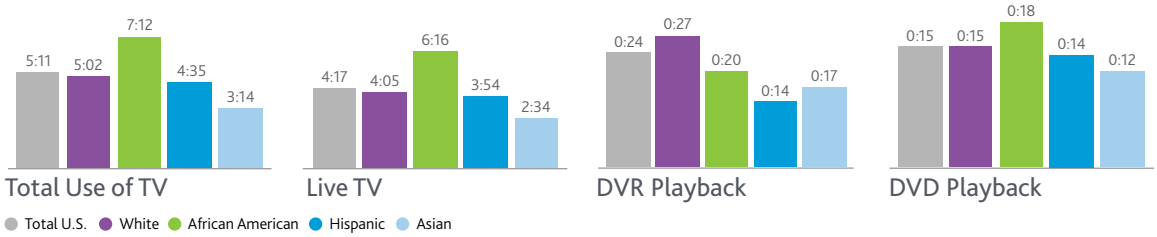
State of the Media
Trends in TV Viewing—2011 TV Upfronts

Consumers' appetite for media continues to grow. New and enhanced technologies only fuel the demand for video content. The average American watched 34 hours 39 minutes of TV per week in Q4 2010, a year-over-year increase of two minutes. The heaviest users of traditional TV are adults 65+ (47 hours 33 minutes per week), followed by adults 50-64 (43 hours per week). Trailing all other age groups, teens age 12-17 watch the least amount of TV (23 hours 41 minutes per week).

Over the 2010-2011 TV season, several trends have emerged in what and how consumers are watching. The Nielsen Company has prepared this fact sheet for your reference to highlight these trends.

Total Day TV and Peripheral Usage by Race and Origin (Daily Hours: Min)



Source: The Nielsen Company. Based on Live Stream for Persons 18-49 during November 2010.

Timeshifted TV

Timeshifting continues to be a significant factor in how consumers watch TV.

> Overall, **38% of TV households in the U.S.** have a DVR (February 2011 Universe Estimates)

In Q4 2010, the heaviest timeshifters were adults 35-49, watching 3 hours 8 minutes of timeshifted TV a week. Teens ranging from age 12-17 watch the least amount of timeshifted TV per week, just 1 hour 31 minutes and the adults age 18-24 are close behind, watching 1 hour 32 minutes of timeshifted TV per week.

Hispanic TV households own the fewest DVRs. As of February 2011, 28.8% of Hispanic TV households owned a DVR, whereas 36% of Asian TV households owned a DVR (February 2011 Universe Estimates).

> In Q4 2010, the average American watched **2 hours 21 minutes** of timeshifted TV per week

Mobile Video Viewing

In Q4 2010, 301 million Americans used a mobile phone; 24.7 million mobile subscribers watched video on a mobile phone, a 41% increase from last year. The growing popularity of mobile video is due, in part, to the rapid adoption of media-friendly mobile devices, including smartphones, which make up 30% of the marketplace.

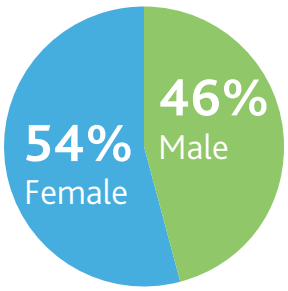
Mobile subscribers on average watched 4 hours 20 minutes of mobile video a month (Q4 2010).

Younger consumers ages 12-17 are the heaviest mobile video viewers, watching 7 hours 13 minutes of mobile video a month (Q4 2010).

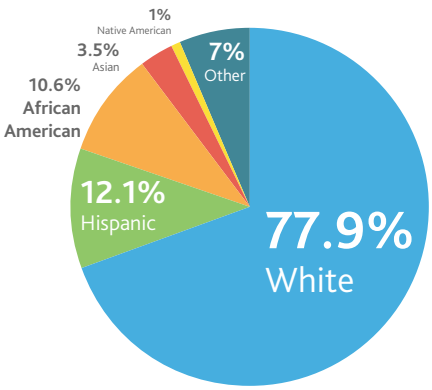
Online Video Viewing

143.9 million Americans viewed video online in January 2011, spending an average of 4 hours 39 minutes viewing video on PCs/laptops.

Online Video Viewers by Gender^



Online Video Viewers by Ethnicity^



Diversity in Sports Viewership

Sports telecasts continue to drive large—as well as lucrative—audiences. In 2010, households earning more than $100,000 were more likely to watch major sporting events like the Super Bowl, World Series or World Cup.

The Super Bowl in particular saw marked audience growth, crushing the record for most watched telecast with 111 million viewers in 2011 and 106 million in 2010.

Record numbers of African American, Hispanic and female viewers helped drive the Super Bowl's audience growth. About 10 million Hispanic viewers watched the game in 2011, up from 8.3 million viewers in 2010. The African American audience also increased dramatically, with about 12.5 million African American viewers tuning into the game, compared to the 11.2 million. About 51.2 million female viewers watched Sunday's game, compared to 48.5 million female viewers last year.

Audience Overlap

In January 2011, 40% of Americans active online (79.5 million consumers) visited TV network and broadcast media sites. During that same time, 49% of Social Networking & Blog Site visitors, also visited TV network and broadcast media sites. Social Networking & Blog Site visitors account for 151.7 million Americans.

50% of U.S. visitors to Facebook also visited TV network and broadcast media sites

76% of U.S. visitors to Twitter also visited TV network and broadcast media sites

Television Advertising

Spending on TV grew 8% in 2010. Ad dollars spent in primetime specifically increased 6% from 2009 to $20 billion, accounting for 43% of spending. Ad dollars spent in primetime specifically increased 6% from 2009 to $20 billion, accounting for 43% of spending.

The 30-second commercial remains the television advertising standard in primetime, accounting for 53% of all commercials (2010). However, commercials are getting shorter; the number of commercials 30-seconds or less increased 12%, while the number of commercials 35 seconds or more decreased 6%.

"Overall TV spending reached **$69 Billion**, increasing 8% versus year prior"

Commercials that air during drama/adventure shows generate the strongest brand recall, as consumers who are engaged in the programming also remain attentive during the commercials. Reality shows follow, with relatively stronger brand recall than sitcoms. Two exceptions are Asian Americans and younger viewers (ages 13-34), who remember the ads that air during reality shows better than sitcoms.

2010 Ad Spend^^

5.4% increase from 2009

$120 Billion spent on all U.S. advertising in 2010

TV was the largest medium, accounting for **57%** of all spending

Notes:
^The Nielsen Company. Nielsen Video Census, Jan. 2011. Home & Work.
^^The Nielsen Company. Nielsen Monitor Plus, 2010.

About The Nielsen Company

The Nielsen Company (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related assets. The company has a presence in approximately 100 countries, with headquarters in New York, USA. For more information on The Nielsen Company, visit www.nielsen.com.

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