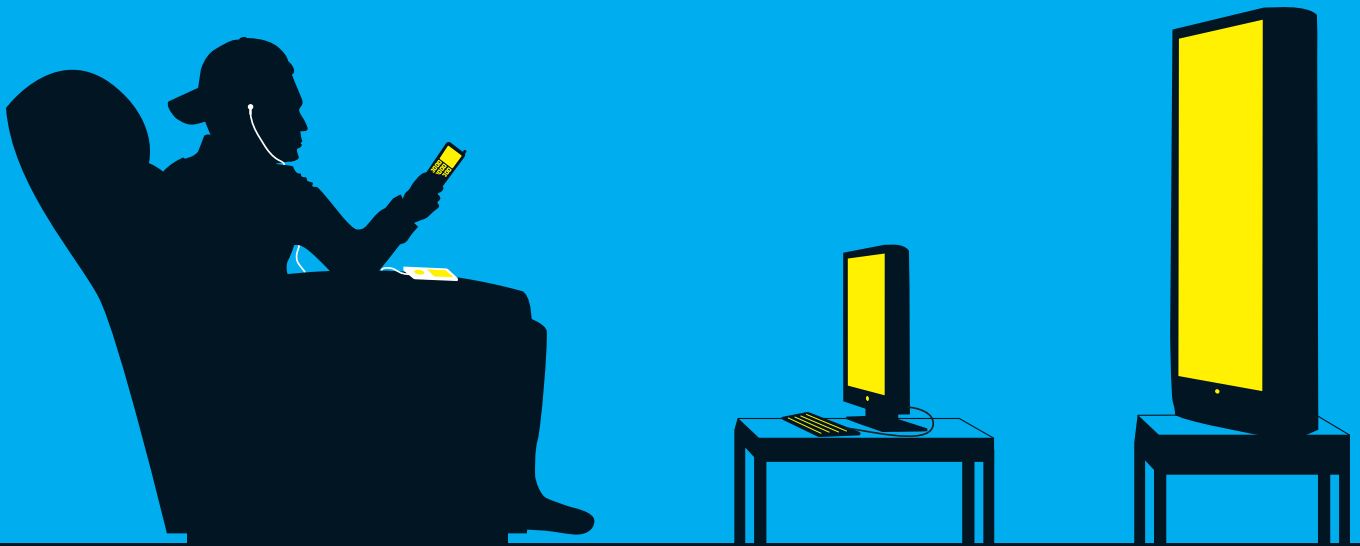


Television,  
Internet and  
Mobile Usage  
in the U.S.



# A2/M2 Three Screen Report

3rd Quarter 2008

nielsen  
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# Screen Time to TV, Internet and Mobile Continues to Rise Among Americans

The Nielsen Company, in its second analysis of TV, Internet and Mobile usage in the U.S. reports that Americans spent more time this quarter using the “Three Screens” than they did during the same time period last year.

The TV and Internet figures below 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 report their usage of mobile video.

Table 1

Overall Usage Number of Users 2+ (000s) – Monthly Reach				
	3Q08	2Q08	3Q07	% Diff Yr to Yr (3Q 08 to 3Q 07)
Watching TV in the home <sup>o</sup>	282,289	281,746	277,916	1.6%
Watching Timeshifted TV <sup>o</sup>	67,656	62,240	50,313	34.5%
Using the Internet**	160,069	159,903	153,572	4.2%
Watching Video on Internet**	120,708	119,179	n/a	n/a
Using a Mobile Phone <sup>^</sup>	224,495	222,514	n/a	n/a
Mobile Subscribers Watching Video on a Mobile Phone <sup>^</sup>	10,260	9,004	n/a	n/a

Table 2

Monthly Time Spent in Hours:Minutes Per User 2+					
	3Q08	2Q08	3Q07	% Diff Yr to Yr (3Q 08 to 3Q 07)	Absolute Diff Yr to Yr (3Q 08 to 3Q 07)
Watching TV in the home*	142:29	140:39	136:54	4.1%	5:35
Watching Timeshifted TV*	6:32	6:10	4:17	52.5%	2:15
Using the Internet**	27:18	26:32	25:49	5.7%	1:29
Watching Video on Internet**	2:31	2:12	n/a	n/a	n/a
Mobile Subscribers Watching Video on a Mobile Phone <sup>^</sup>	3:37	3:15	n/a	n/a	n/a

Table 3

Monthly Time Spent in Hours:Minutes – 3Q 2008								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
Watching TV in the home*	108:34	110:59	108:36	133:00	134:51	159:23	175:18	196:23
Watching Timeshifted TV*	5:25	4:55	4:36	10:04	8:15	7:19	6:32	3:44
Using the Internet**	5:38	12:48	12:59	28:40	37:56	35:24	35:05	26:39
Watching Video on Internet**	2:05	2:55	3:57	3:21	2:44	2:17	1:37	1:07
Mobile Video Subscribers								
Watching Video on a Mobile Phone^	n/a^^	4:20^^	3:15	4:20	3:37	2:10	2:53	n/a <sup>oo</sup>

Table 4

Video Audience Composition by Age – 3Q 2008								
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On TV*	11%	7%	7%	13%	14%	17%	14%	17%
On the Internet**	7%	9%	8%	15%	19%	20%	16%	7%
On Mobile Phones^	n/a^^	18%^^	15%	32%	20%	10%	6%	1%

Table 5

Video Audience Composition by Gender – 3Q 2008		
	F2+	M2+
On TV*	54%	46%
On the Internet**	55%	45%
On Mobile Phones^^	40%	60%

## FOOTNOTES FOR ALL CHARTS:

Source for all charts: The Nielsen Company

- ° 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. Online Video duration metrics are not comparable to previous measurement periods as a result of methodology change.
- ^ The average monthly unique users of mobile phones and mobile video in 3Q 2008 and 2Q 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 3Q 2008 and 2Q 2008 now include mobile phone users who access mobile video through any means (including mobile Web), and are no longer limited to subscription-based mobile video. Projection of all subscribers is based on persons 2+. Projection of mobile video viewers, and all other mobile video estimates, based on subscribers 13+.
- ^^ 2Q 2008 Mobile Video time spent and audience composition estimates are based on 1Q 2008 Mobile Video Report. These metrics, available biannually prior to 3Q 2008, will be made available on quarterly basis going forward. Subscriber and mobile video user projections are, as labeled, 2Q and 3Q 2008.
- ^^^ 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.

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### Key Facts:

- Americans are spending more time than ever with their televisions, computers and mobile phones, yet television remains the dominant choice for video consumption, viewers watched more than 142 hrs a month – 5 hours more than last year.
- People in the U.S. who report some timeshifting activity spend 6 hrs, 32 minutes per month watching timeshifted TV, which is more than double the amount of time they watch video online at 2 hrs, 31 min per month.
- Men are more likely than women to watch video on mobile phones, while women are more likely than men to watch video on the Internet.
- During the third quarter, there was no shortage of online video content with events such as the Olympics, Major League baseball games, the political conventions and debates, and the financial crisis. Online video use grew steadily through the quarter.

### Trends to Watch:

- The number of homes with DVRs has grown to 27% of the U.S. which is expected to increase as more cable and satellite operators accelerate their DVR-equipped offerings.
- Online audiences, including those using video, will continue to grow.
- The average monthly time spent viewing mobile video among reported mobile video users increased 11%, from 3 hours, 15 minutes to 3 hours, 37 minutes between 2Q 2008 and 3Q 2008 – this, as more full episodes of TV content have been made available over mobile video.

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This report will be published by The Nielsen Company quarterly. For more information, please contact your Nielsen account representative.