



cross-platform  
is the new norm

nielsen  
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an uncommon sense  
of the consumer.™

# Understanding consumer behavior

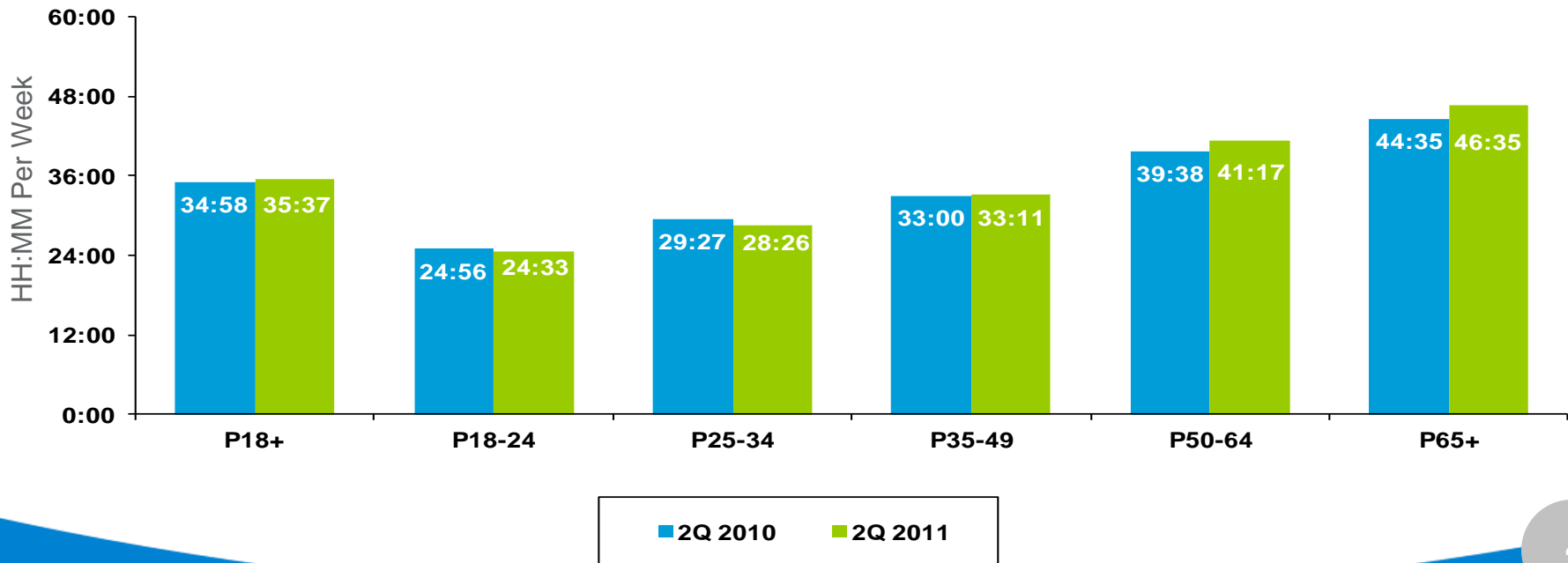


# Cross-platform is the new norm

- Myth busting: Debunking Media Myths
- How We Consume Media - Yesterday vs. Today
  - Where are we going? How did we get here?
  - Co-Viewing: Are we watching alone or are we watching as a household?
  - But, viewers aren't just watching TV anymore

# Is the Internet killing TV? No!

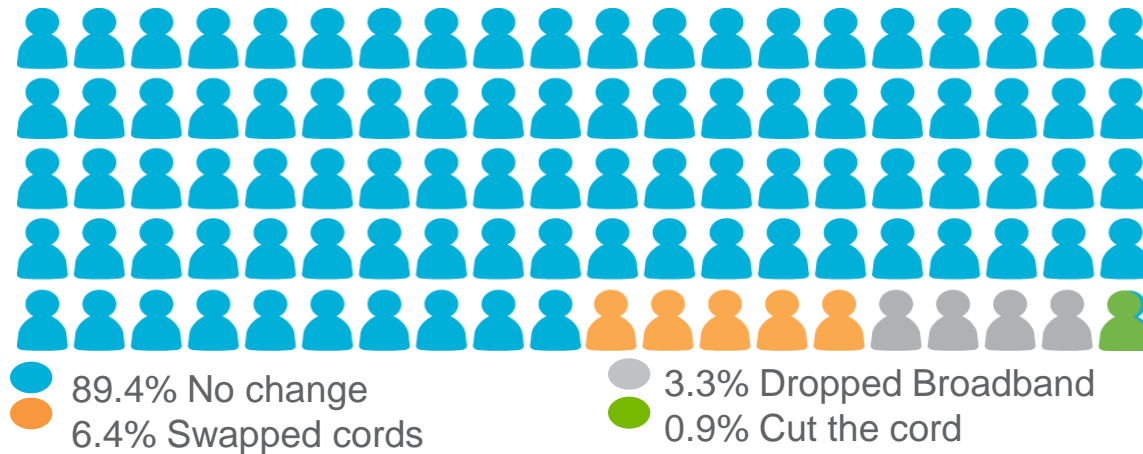
During 2Q 2011, P18+ are viewing 40 additional minutes of TV a week compared to last year



# Are people cutting the cord? No!

More than 91% of TV households pay for a TV Subscription

**<1%** of TV households are cutting the cord



Cable Homes with Broadband in the Nielsen National People Meter sample:  
comparing September 2010 and September 2011

# Are people giving up their TV sets? No!

*Only 3% of Homes don't have a TV*

WHO

## Status

- Lower income
- Younger
- Lower tech
- Rural

## Lifestage

- Younger
- Single
- Recent college graduate
- Urban

WHY

## Why Households are going without a TV:

- Watching on a DVD or VCR
- Watching on a computer
- Expense
- Lack of interest in TV programming
- Watch TV at a friends or relative's home

Where are we going?  
How did we get here?

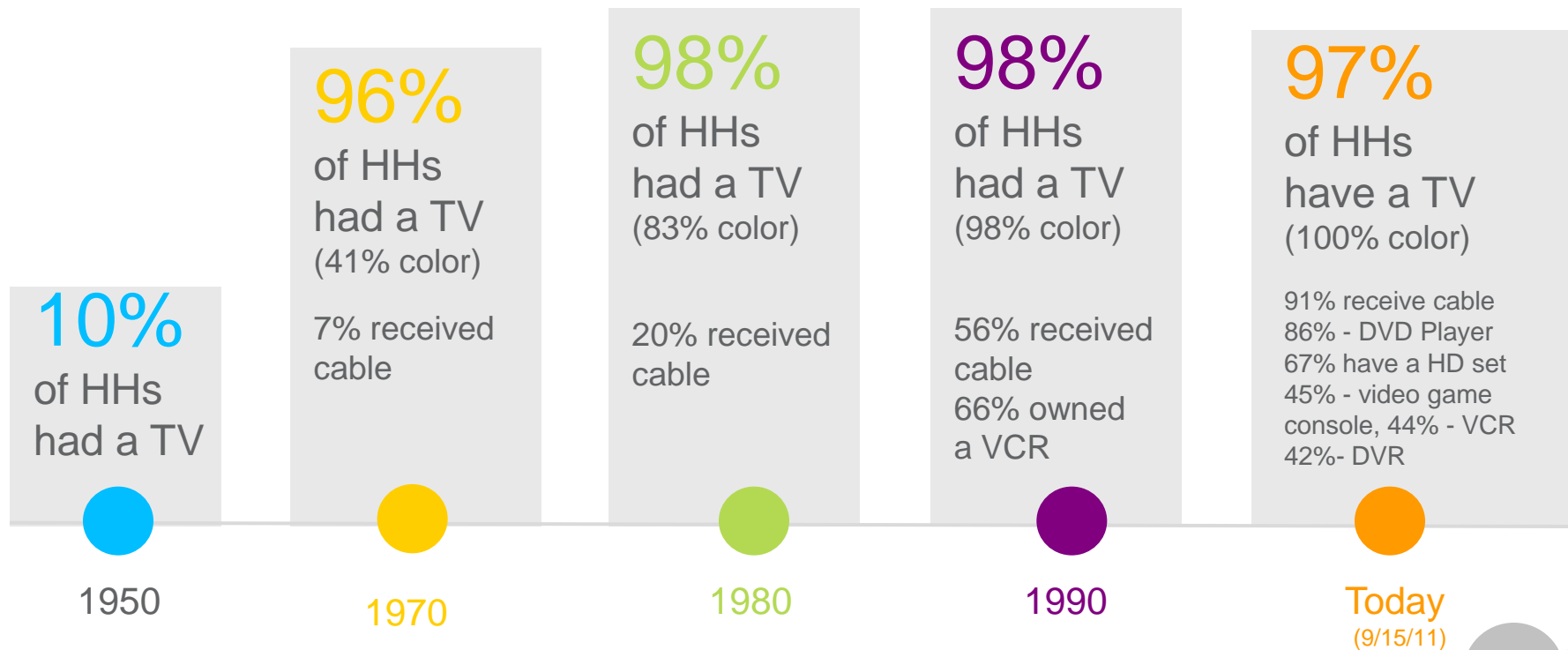
The Nielsen logo, consisting of the word "nielsen" in a lowercase sans-serif font with a dotted line underneath, is centered within a white circle. The circle is positioned in the lower right area of the slide, partially overlapping the blue background and the grey footer.

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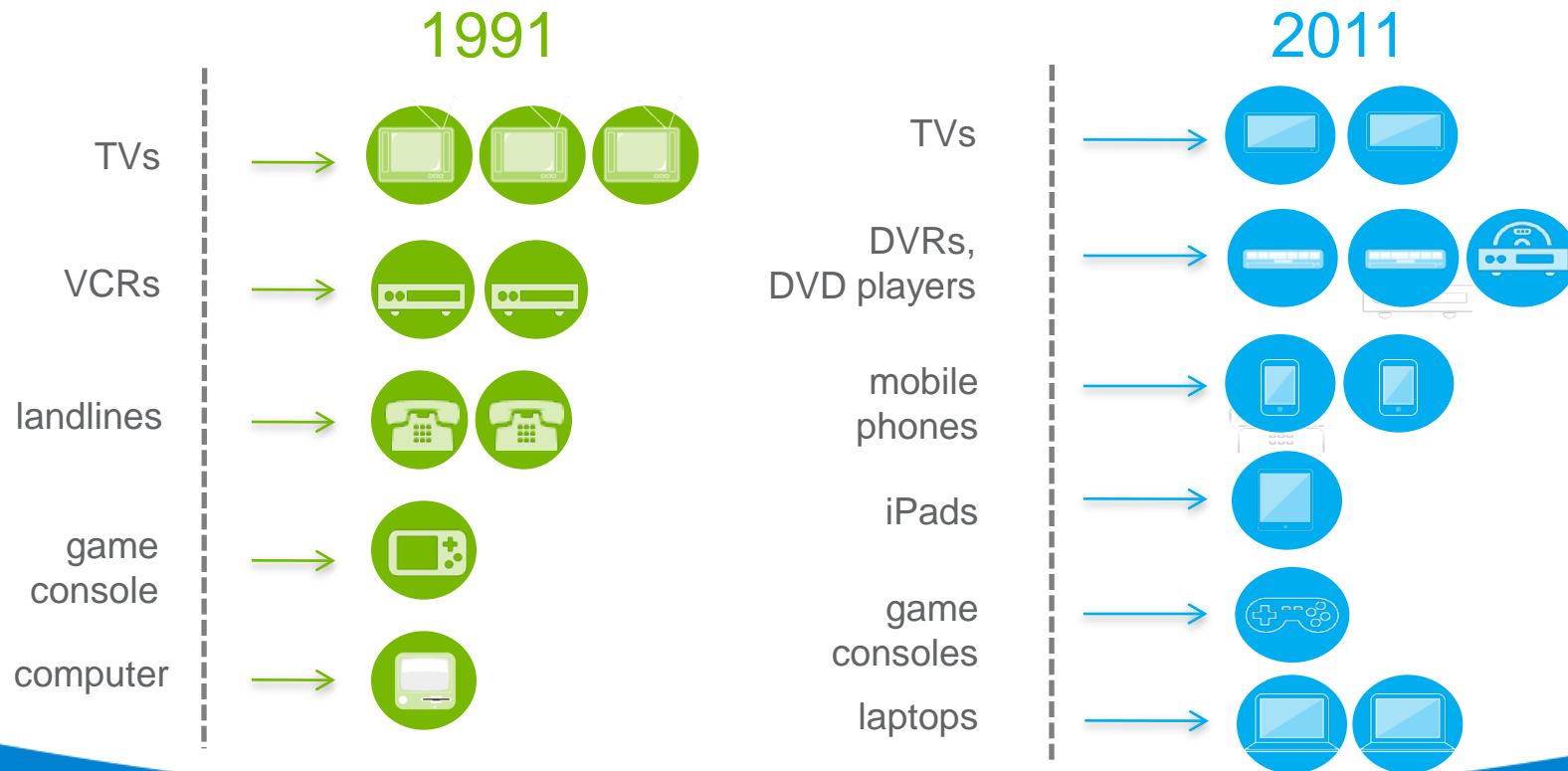
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# The evolution of TV



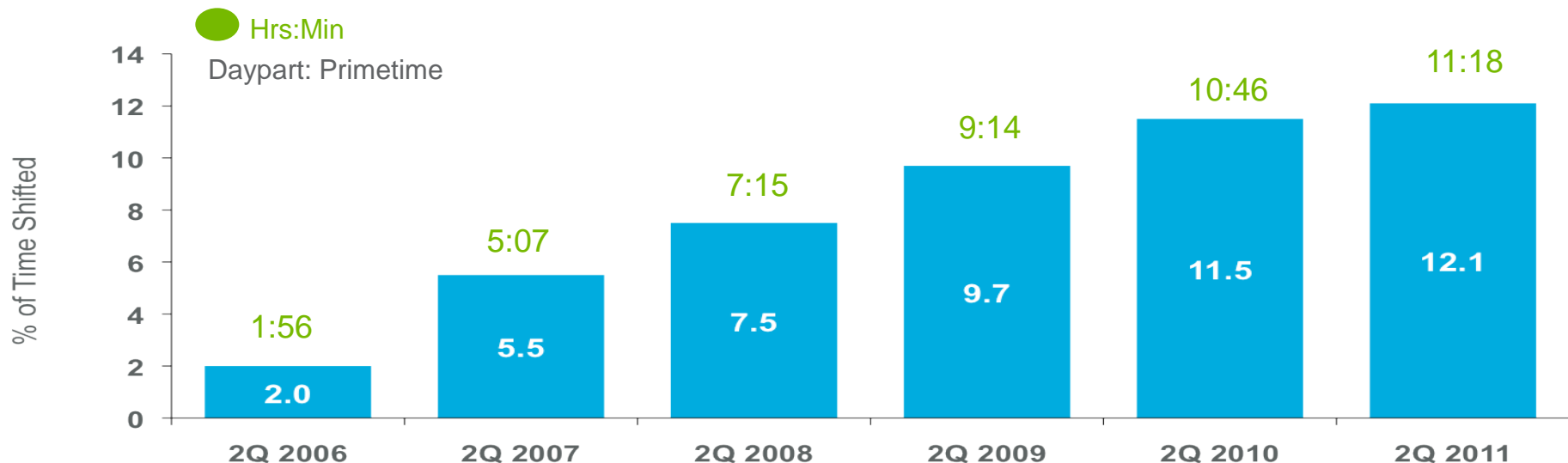


# Close-up on device transformation



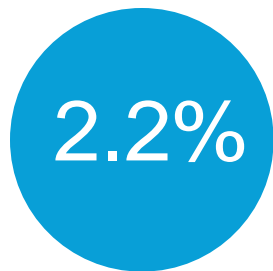
# Consumers take control of their viewing

*DVRs are in nearly 40% of households and timeshifting continues to grow each year*



# DVRs – No need to choose!

*Video On Demand and Online are adding to Flexibility*



2006

American Idol and NCIS, Tuesday 8p



2011

Castle and Hawaii Five-0, Mondays 10p

In 2006, just 2.2% of *P18-49* watched two shows that aired in the same time period. But as DVR penetration grew allowing for viewing “on your time”, 7.0% of viewers watched two shows that aired in the same time period.

*% of Audience Duplication, Time Period: May 2006, May 2011*

# Co-Viewing: Are we watching alone or are we watching as a household?

The Nielsen logo, consisting of the word "nielsen" in a lowercase, sans-serif font, with a series of six dots underneath it. This logo is contained within a white circle that is partially obscured by a grey wavy line at the bottom of the slide.

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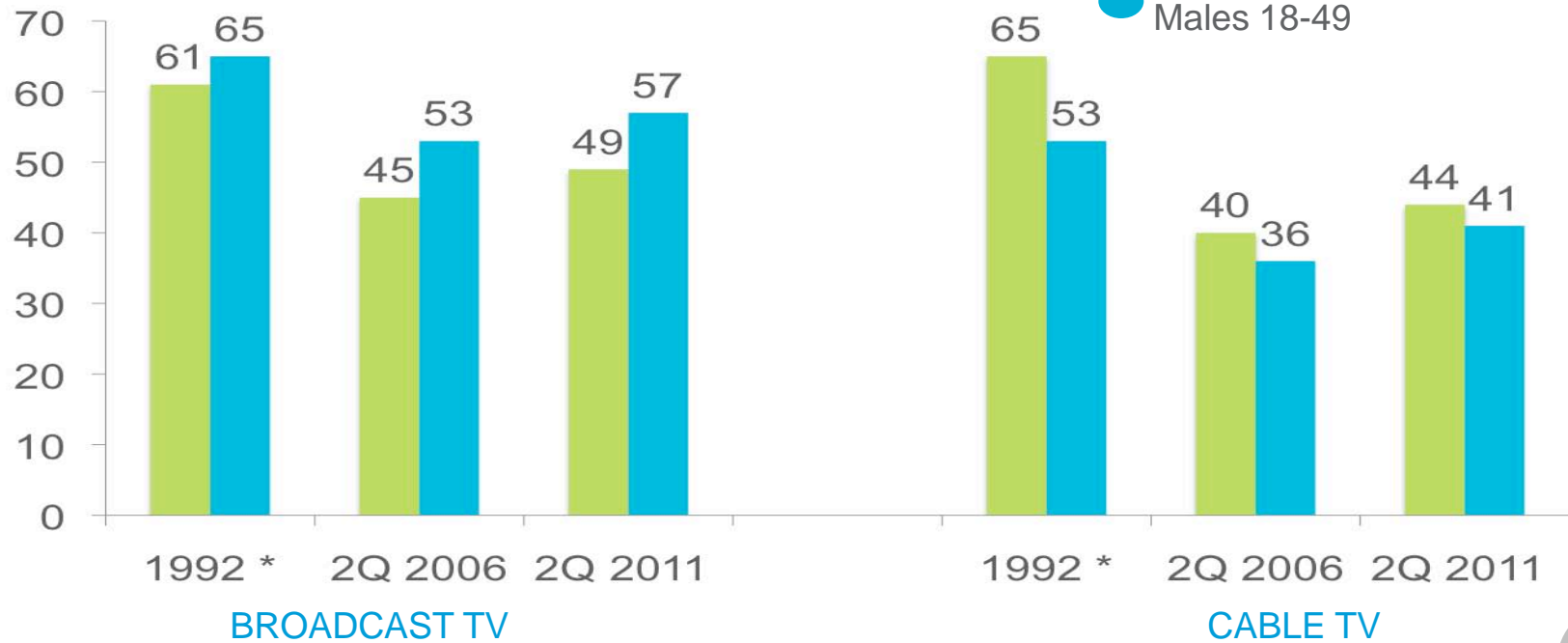
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# Co-Viewing makes a comeback in Primetime

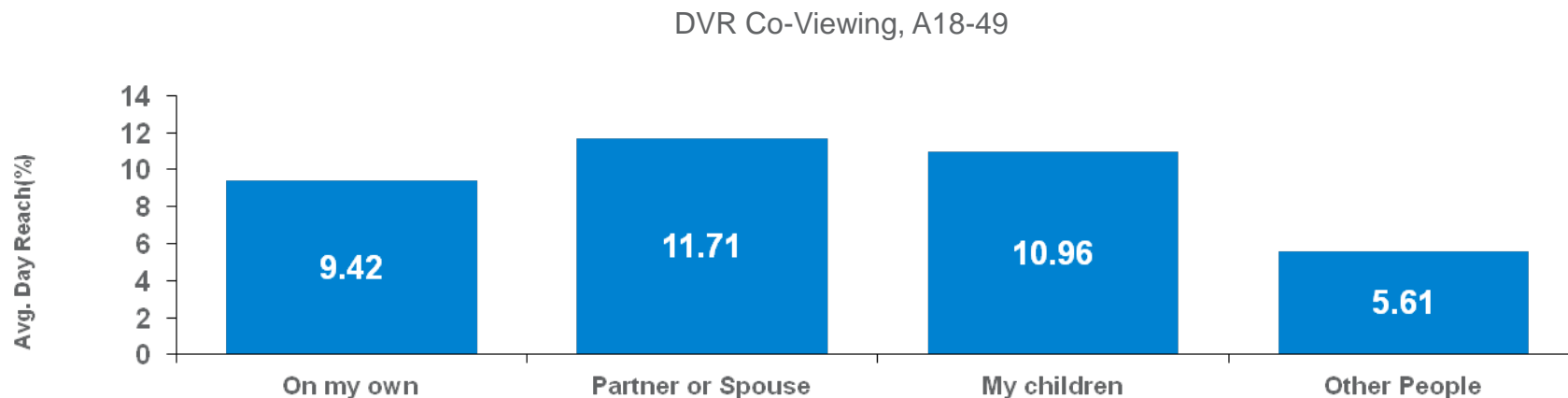
Percent of Co-Viewing behavior by gender

● Females 18-49  
● Males 18-49



\* Based on TV Audience Report

# Co-Viewing – more adults watch DVR with others than alone



But, viewers aren't just watching  
TV anymore.

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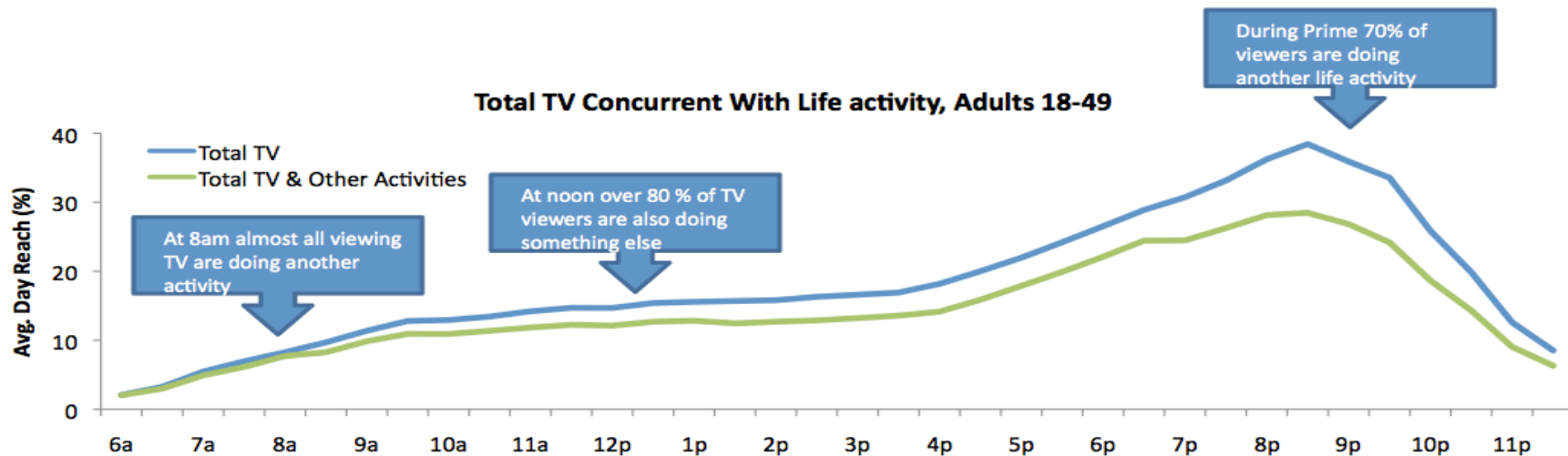
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# TV viewing coexists with daily life activity

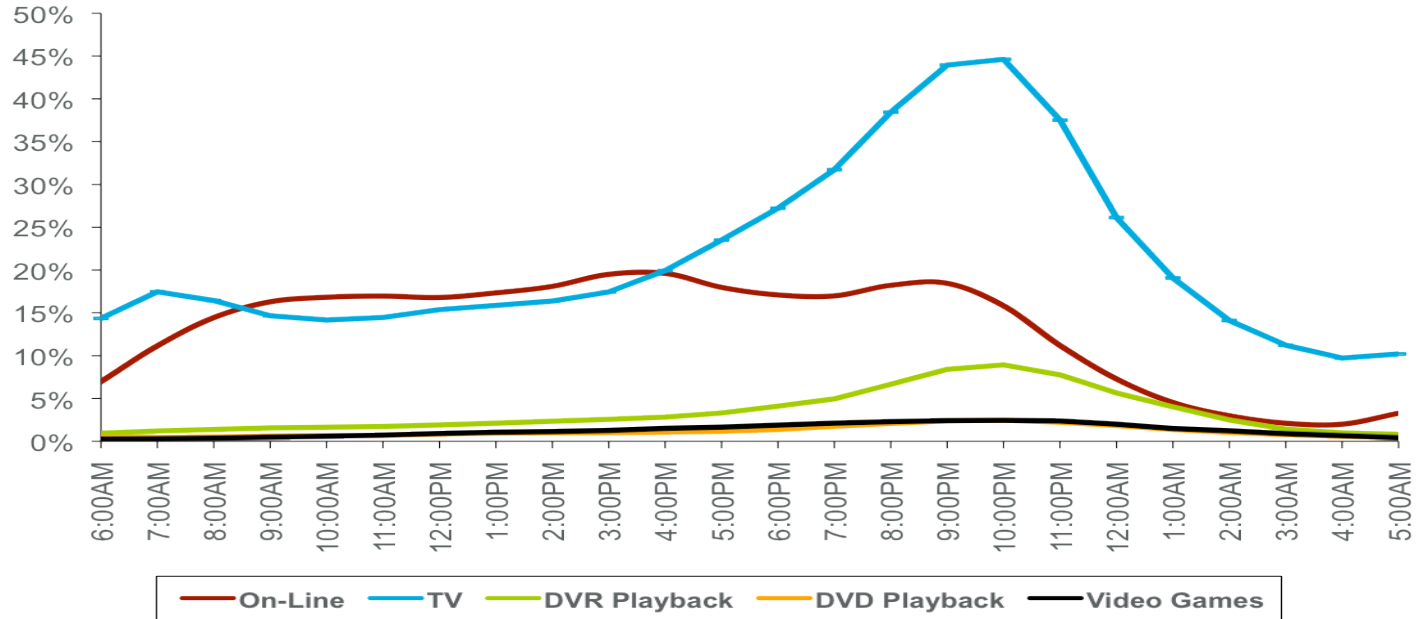
USA TouchPoints





# Hourly Reach - TV vs. Online - weekdays

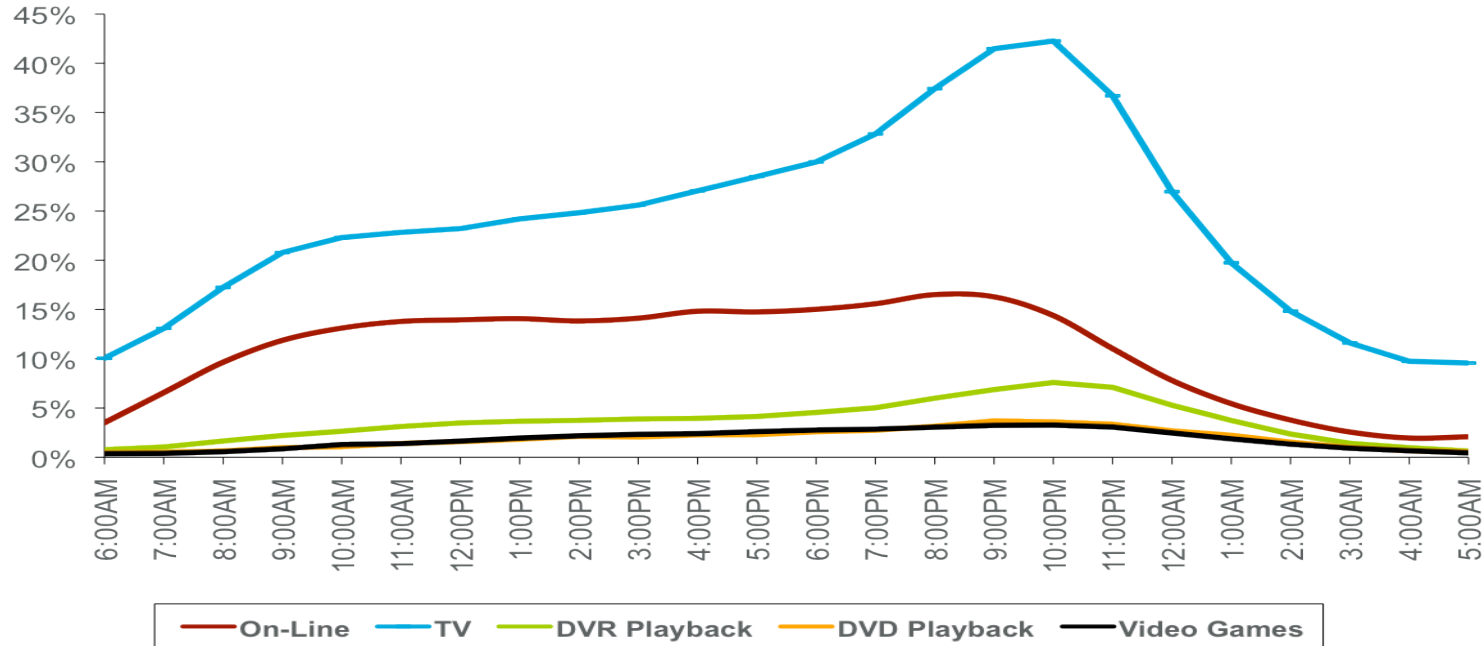
P18-49 – May 2011



3rd week of May – 5/09 – 5/15/11

# Hourly Reach – TV vs. Online – weekends

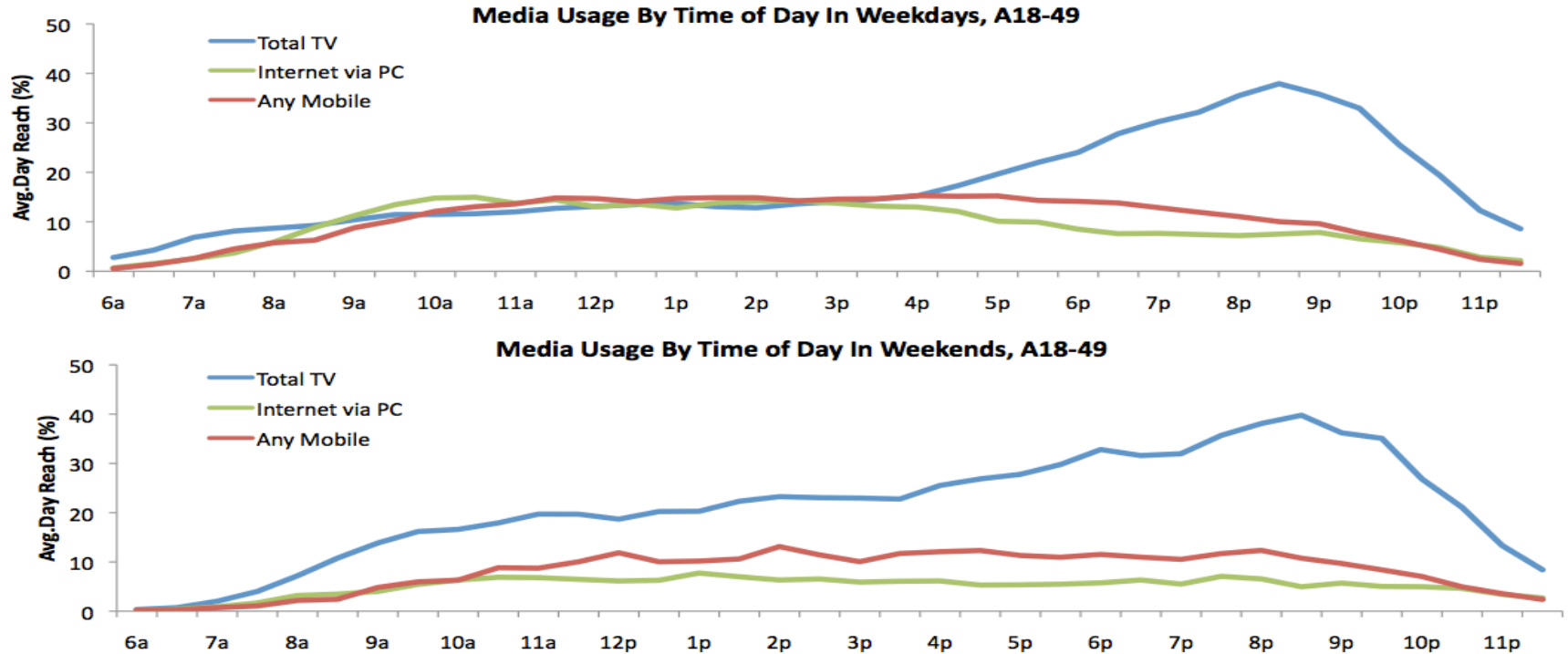
P18-49 – May 2011



3rd week of May – 5/09 – 5/15/11

# Weekend allows for more TV use during daytime

USA TouchPoints

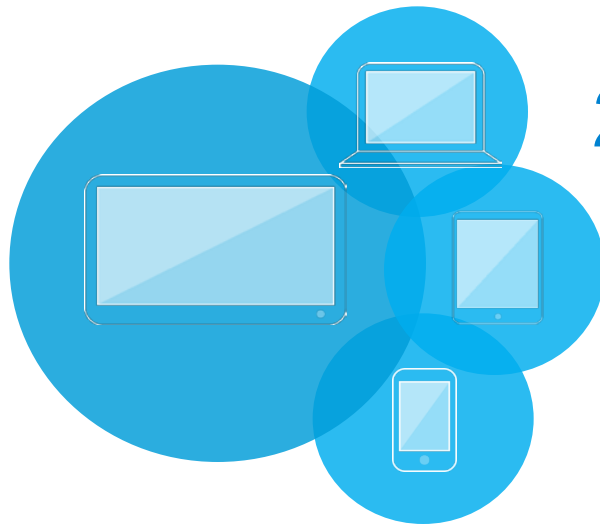


# What are people doing when they are watching TV today vs. yesterday?

1991

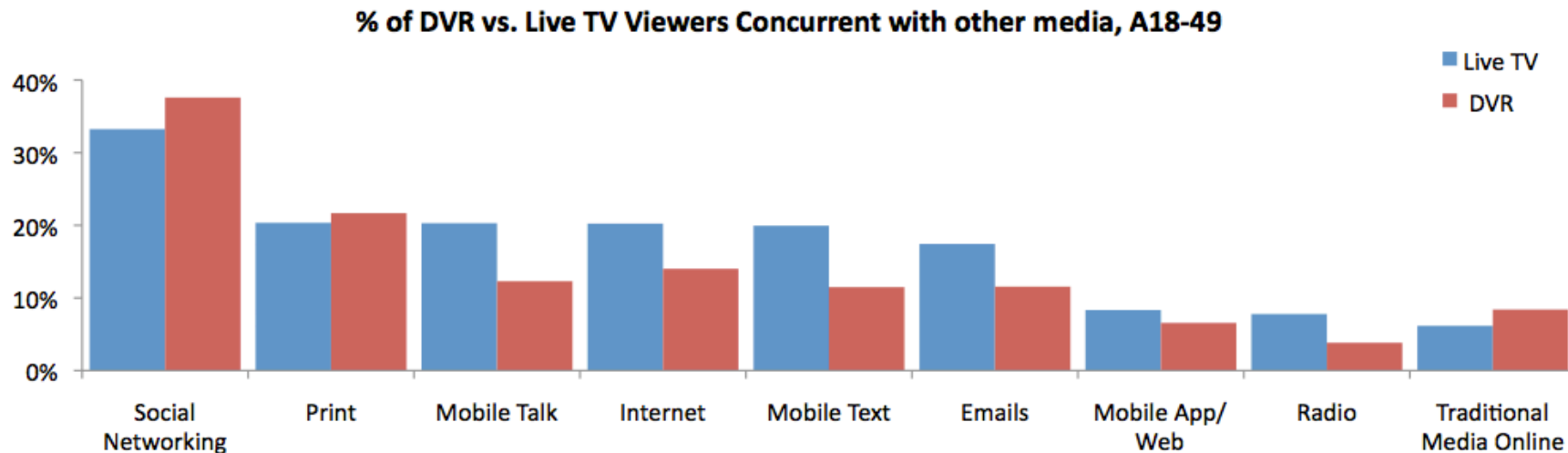


2011

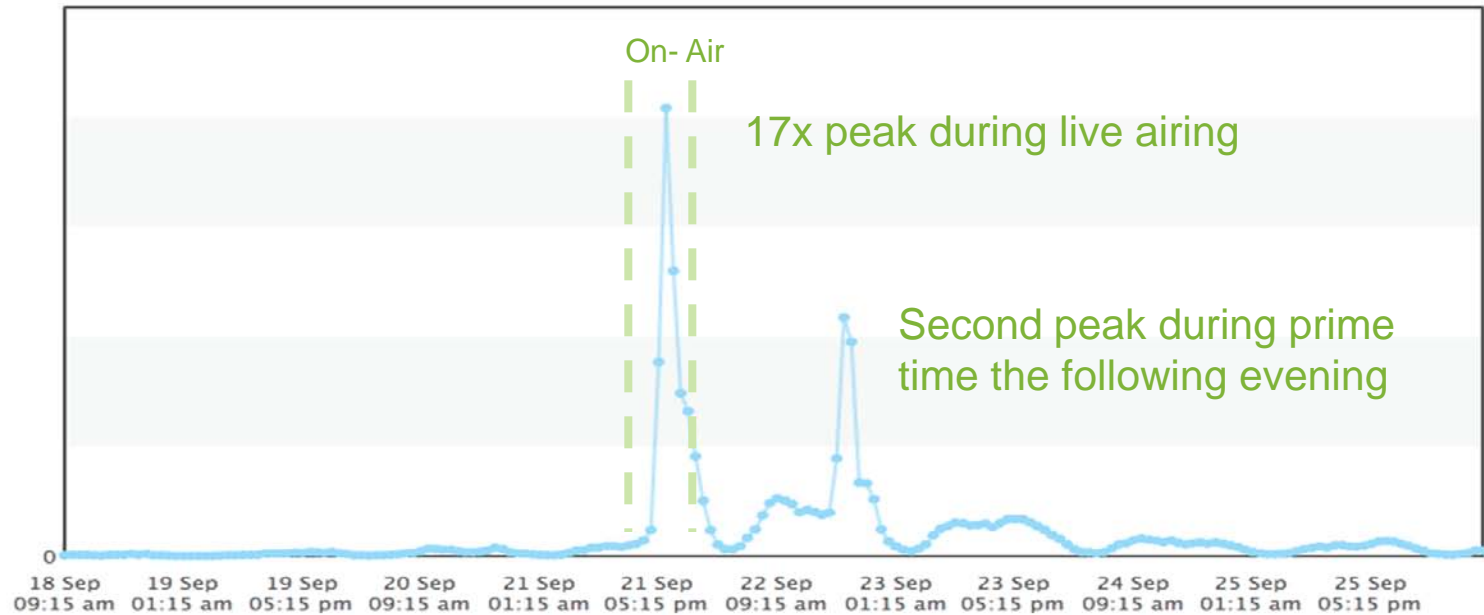


# What are the companion media activities for TV viewers?

USA TouchPoints



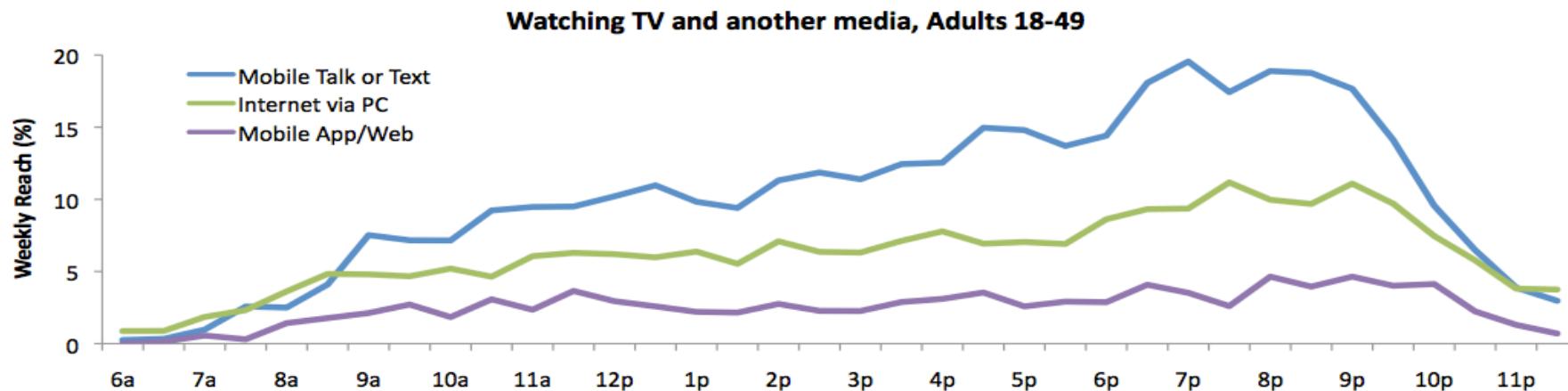
# Simultaneous usage example: mentions of “X-Factor” on Facebook



# How do we know cross-platform is the new norm?

*Daily concurrent media usage of TV viewers*

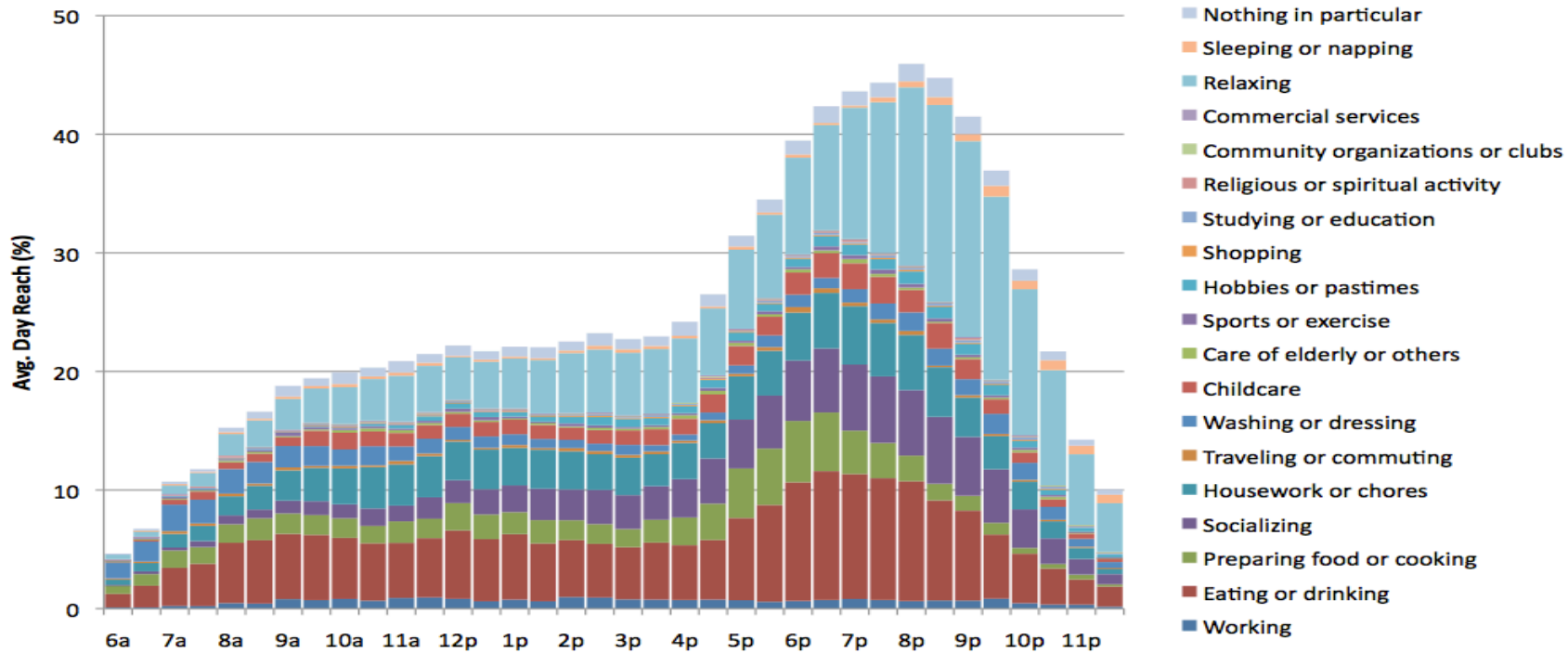
USA ~~Touch~~ Points



# TV viewing is integrated into viewers' daily life activity

USA TouchPoints

**Total TV Contiguous With Life Activities, Total Adults**





# Multiplatform use: what does it mean?

1

Using the internet to comment on viewing **adds value** to the content and the advertising

2

**Enhance the viewing experience** watching the NFL draft on ESPN and visiting the ESPN.com site

3

Viewers are **more engaged** watching a big event live and commenting on Facebook, Twitter etc.

4

Some big events nearly 4 times **more simultaneous usage** than other viewing experiences

# Using all the tools to engage the viewer

## Understand the Environment

Evaluate the total viewing experience

While TV is most used,  
Other media provide added engagement and opportunity

## Understand the Consumer

The consumer is not thinking either or

Consumers have it all so  
need to reach them on the devices when and where they are engaged

# Cross-Platform is the New Norm

Questions?

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