

Viewer “Loyalty” and Awareness of Broadcast Programming Online

Conducted at CBS Television City
October, 2007



Objectives

- To gauge consumer loyalty to Broadcast and Cable TV series.
- To understand perceptions of full-episode video content and availability online.



Methodology

- Fielded October 2007
- Computer aided survey was administered to nearly 1,600 adults at the CBS Television City research facility in the MGM Grand Hotel in Las Vegas



Demographics

- 41% Male, 59% Female
- Skews slightly older with 27% younger than 35, 72% 35+
- Upscale: 45% make 75K+
- 71% white, 64% married, 82% with at least some college education

When you miss an episode how do you get caught up (favorite broadcast series)?

Age & Sex

	Total	Male	Female	Age 18-34	Age 35-54	Age 55-99
Sample Size: N=	1,599	659	940	410	764	395
Watch it using your DVR	29%	32%	27%	37%	30%	18%
Watch a rerun	26%	26%	26%	19%	26%	35%
I don't do anything. I wait for the next episode	13%	13%	12%	5%	13%	20%
Watch it on the internet	7%	7%	7%	16%	5%	2%
Watch it using your VCR	7%	5%	9%	4%	9%	8%
Ask a friend what you missed	6%	4%	7%	6%	6%	7%
Wait for it to come out on DVD	5%	5%	4%	7%	5%	3%
Read Summary	2%	0%	2%	0%	2%	2%
Watch it using VOD service	1%	1%	1%	1%	1%	1%
Download and watch on MP3	1%	2%	1%	2%	1%	0%
Other	4%	5%	4%	3%	4%	6%

When you miss an episode how do you get caught up (favorite broadcast series)?

High Speed, MP3, DVR, PC, iTunes HH

iTunes HH

	Total	High-Speed Internet	MP3 Player	DVR	PC	iTunes
Sample Size: N=	1599	1203	906	734	1436	541
Watch it using your DVR	29%	34%	36%	59%	30%	40%
Watch a rerun	26%	25%	24%	15%	26%	20%
I don't do anything. I wait for the next episode	13%	11%	9%	6%	12%	7%
Watch it on the internet	7%	9%	10%	6%	8%	13%
Watch it using your VCR	7%	6%	5%	2%	7%	4%
Ask a friend what you missed	6%	5%	4%	3%	6%	4%
Wait for it to come out on DVD	5%	4%	5%	3%	4%	5%
Read Summary	2%	2%	2%	1%	1%	1%
Watch it using VOD service	1%	1%	1%	1%	1%	2%
Download and watch on MP3	1%	2%	2%	1%	1%	2%
Other	4%	3%	3%	2%	4%	2%

Which of the following networks offer full length episodes for free on their websites?

Age & Sex

	Total	Male	Female	Age 18-34	Age 35-54	Age 55-99
Sample Size: N=	1599	659	940	410	764	395
ABC	24%	22%	26%	33%	23%	18%
CBS	22%	22%	23%	24%	23%	20%
NBC	20%	22%	19%	27%	17%	19%
FOX	15%	18%	13%	18%	12%	17%
CW	4%	4%	5%	8%	3%	1%
PBS	3%	4%	3%	2%	3%	6%
Don't Know	57%	55%	58%	48%	61%	58%
None of the above	7%	8%	6%	4%	6%	12%

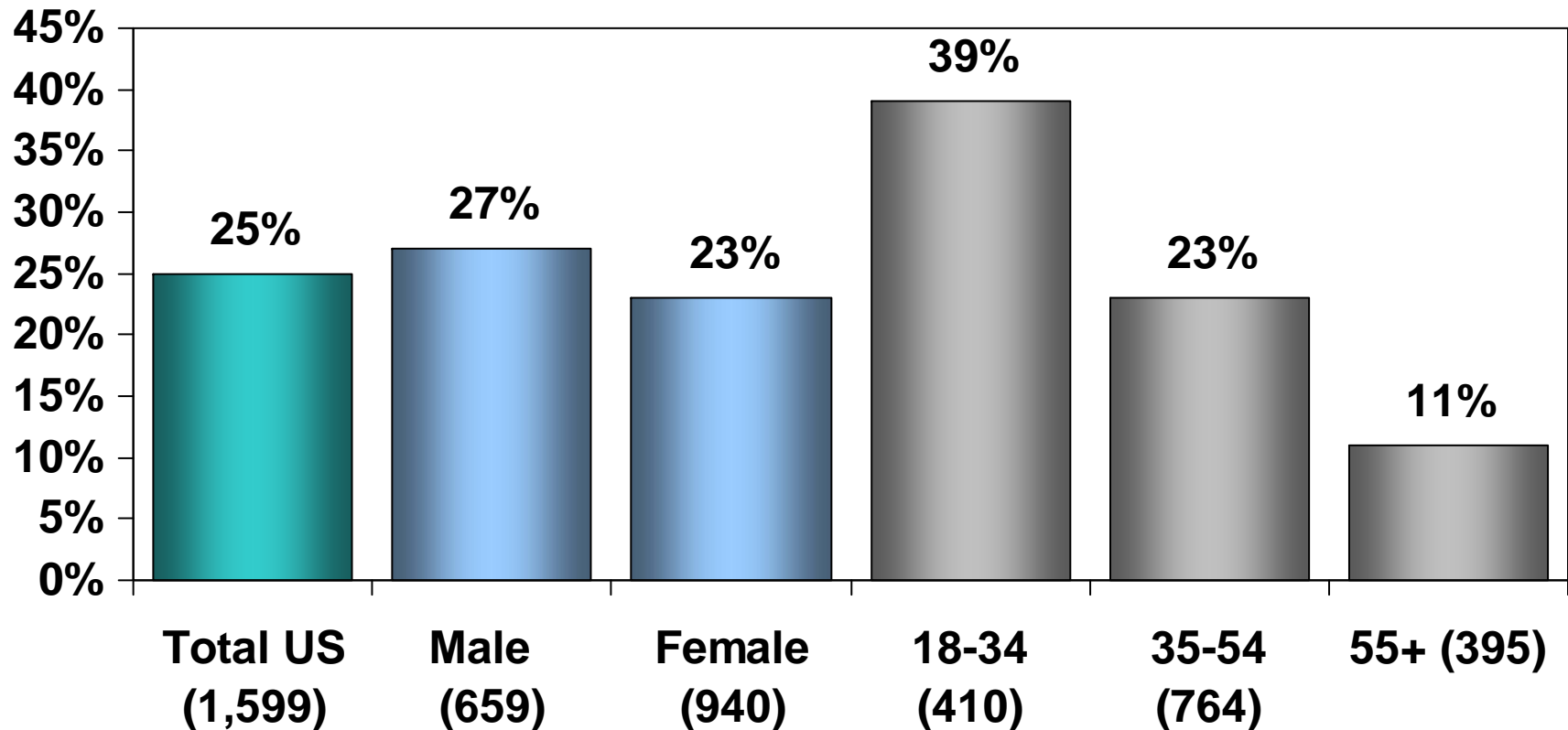
Which of the following networks offer full length episodes for free on their websites?

High Speed, MP3, DVR, PC, iTunes HH

	Total	High-Speed Internet	MP3 Player	DVR	PC	iTunes
Sample Size: N=	1599	1203	906	734	1436	541
ABC	24%	27%	29%	29%	25%	33%
CBS	22%	25%	24%	27%	23%	26%
NBC	20%	23%	24%	25%	21%	26%
FOX	15%	16%	16%	17%	15%	18%
CW	4%	5%	6%	7%	5%	7%
PBS	3%	3%	3%	3%	3%	3%
Don't Know	57%	56%	55%	54%	58%	51%
None of the above	7%	5%	5%	5%	6%	4%

Have you watched full length episode streamed online in the past 3 months?

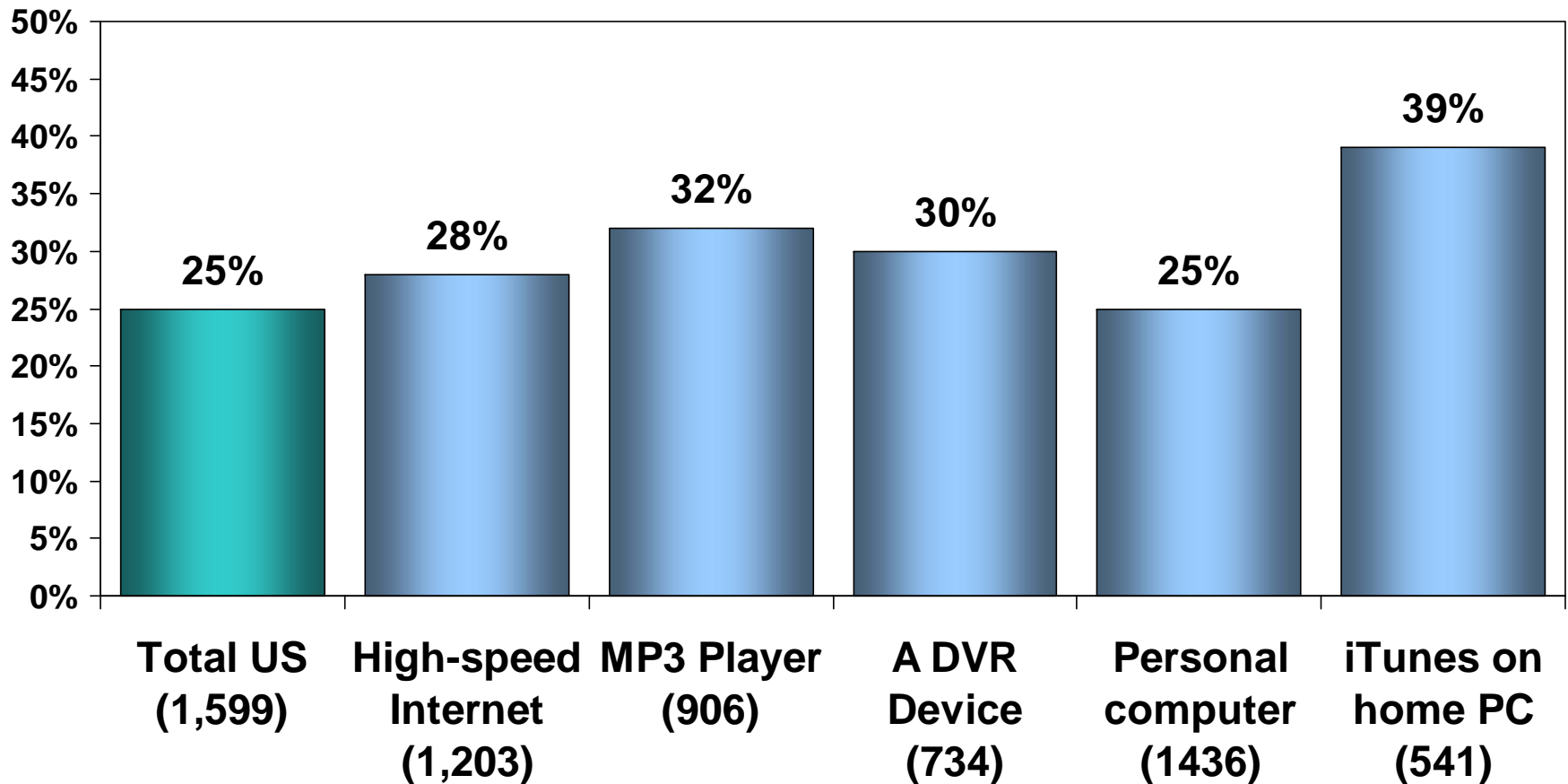
Age & Sex





Have you watched full length episode streamed online in the past 3 months?

High Speed, MP3, DVR, PC, iTunes HH



When you watch full episodes streamed on the internet, what sites do you go to?

Age & Sex

	Total	Male	Female	Age 18-34	Age 35-54	Age 55-99
Sample Size: N=	395	180	215	161	176	45
ABC.com	50%	43%	56%	52%	52%	36%
NBC.com	41%	43%	38%	50%	37%	31%
CBS.com	37%	38%	36%	32%	43%	33%
FOX.com	24%	31%	18%	24%	24%	27%
YouTube	17%	20%	14%	25%	10%	4%
iTunes	15%	17%	13%	20%	12%	4%
CWTV.com	8%	8%	7%	10%	5%	2%
BitTorrent	6%	8%	4%	10%	3%	0%
PBS.org	3%	4%	2%	2%	4%	4%
Other	15%	18%	13%	16%	12%	24%

When you watch full episodes streamed on the internet, what sites do you go to?

High Speed, MP3, DVR, PC, iTunes HH

	Total	High-Speed Internet	MP3 Player	DVR	PC	iTunes
Sample Size: N=	395	337	292	219	363	211
ABC.com	50%	53%	53%	55%	51%	57%
NBC.com	41%	42%	43%	47%	42%	44%
CBS.com	37%	39%	40%	44%	38%	40%
FOX.com	24%	22%	25%	27%	23%	23%
YouTube	17%	18%	20%	18%	18%	26%
iTunes	15%	15%	19%	20%	15%	26%
CWTV.com	8%	8%	10%	11%	7%	11%
BitTorrent	6%	7%	8%	6%	6%	10%
PBS.org	3%	3%	3%	3%	3%	3%
Other	15%	14%	13%	9%	15%	11%

Summary

- We saw a notable difference in the top two approaches in catching up on current episodes of favorite series: watching via DVR (29%) and waiting for reruns (26%)
- Younger respondents are more proactive about staying caught up with their favorite TV series and are more likely to stream video online to stay up to date.
- DVR owners are the most loyal to their favorite series, using the device to catch up on missed episodes

Summary

- Presence of other technologies are indicators of series loyalty
 - Those with iTunes on their home PC are more likely to stay in touch with their favorite TV series (though not necessarily via that portal)
- Males are slightly more proactive about staying caught up with their favorite TV series.
- Income is not a driving factor in series loyalty
- Younger respondents (<35) are more likely to stream video online to stay up to date.

Summary (continued)

- Awareness of full-length eps on individual broadcast network websites averaged slightly above 20%
- 25% say they have watched a full-length episode streamed online in the past three months, led notably by 18-34 year olds (39%)
- ABC was the most popular destination for watching full-length eps (50%) among the major broadcast nets, followed by NBC and CBS (41% and 37% respectively)