



# Syndication's Commercial Advantage Among DVR Viewers



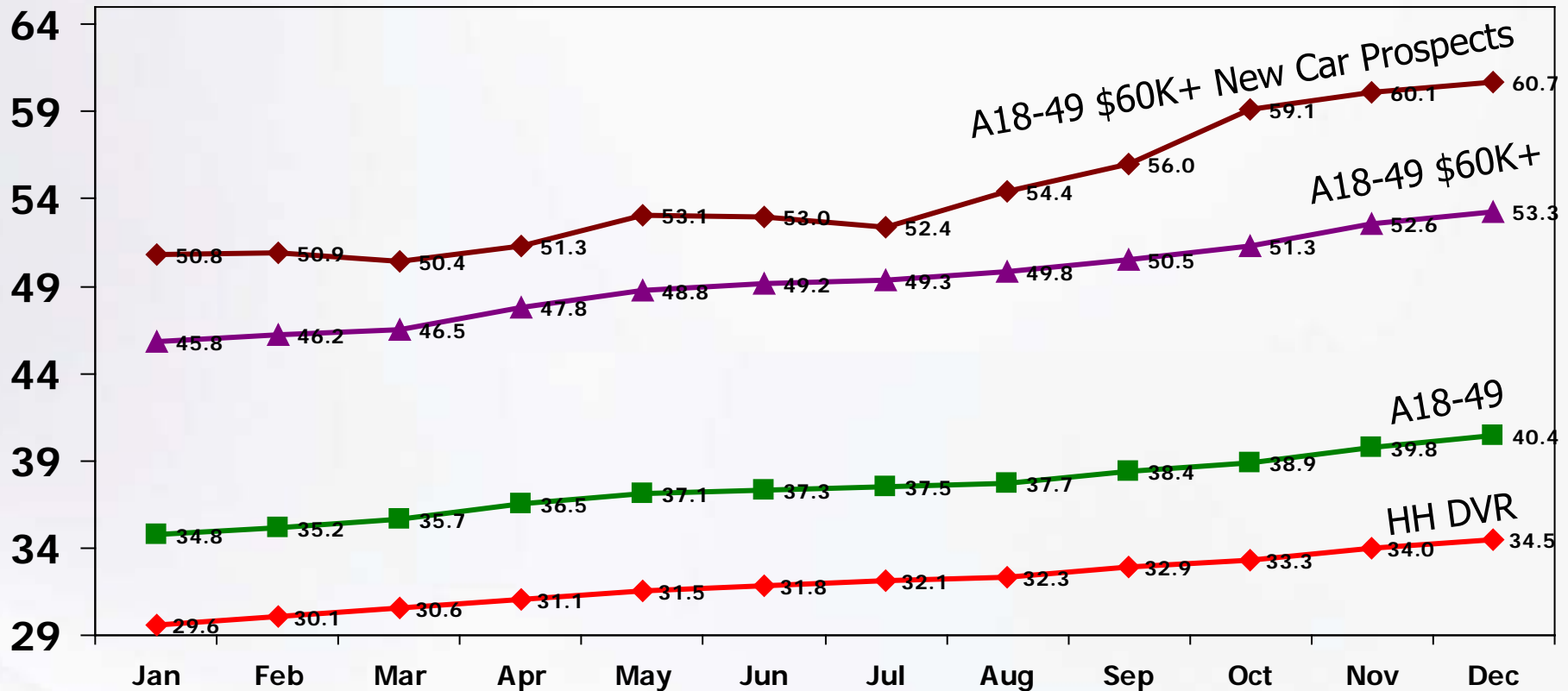
# Executive Summary

- DVR penetration is on the rise and higher than often reported figures
  - Over 40% for adult targets
  - Over 50% for upper income adults
  - Over 60% for upper income new car prospects
- DVR viewers enjoy time-shifting and skipping through commercials
- Syndication avoids the DVR and commercial skipping with higher “Live” viewership than network prime
- The small percentage of syndication viewers that delay viewing have higher playback than network prime
- Syndication’s commercial audience cumes faster
  - Valuable for retail driven messages
- Syndication’s viewers stay through the commercials
  - Syndication’s C3 to program rating index is 34% higher than that of network prime



# DVR Penetration: Rising Higher For Key Targets

## 2009 DVR Penetration





**66% of marketers think that DVR's will reduce or destroy the effectiveness of :30 commercials**

ANA/Forrester Research, TV and Everything Video Forum, 2/10



**“Time shifting is the reality ...  
we can’t dig our heads in the sand  
and say people are watching them  
[the commercials.]”**

Don Seaman, VP Director of Communications Analysis, MPG  
MediaLifeMagazine, 1/10

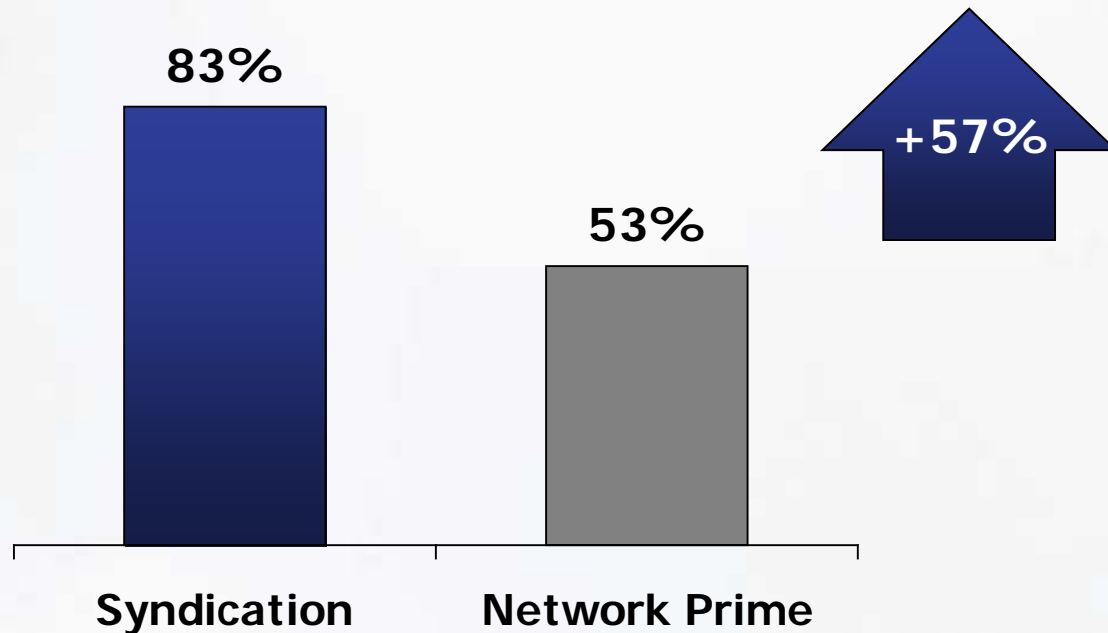


## Syndication's Answer:

**If they're watching "Live"  
they can't electronically  
skip commercials.**

# More Than 8 in 10 Adults Watch Syndication "Live"

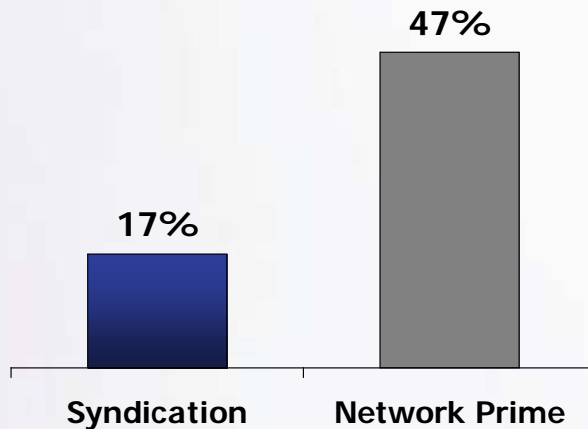
% Watching Live  
A18-49 in DVR HH's



# Even Those Delaying Viewing Play Back the Commercials

## % Delayed Viewing

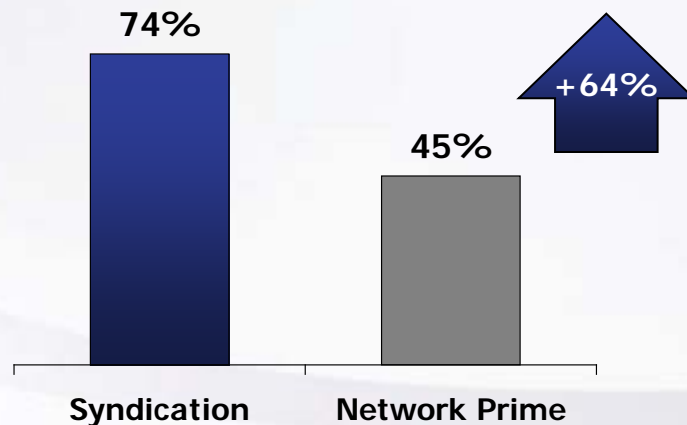
A18-49 in DVR HH's



- Syndication's "Live" viewing of 83%, shown on the previous slide, means that only 17% of syndication's viewing is delayed
- Network prime's delayed viewing of 47% is nearly 3 times that of syndication

## % Commercial Playback

A18-49 in DVR HH's



- Three-fourths of the 17% delaying their syndication viewing are still playing back the commercials
- Less than half of Network prime commercials are played back

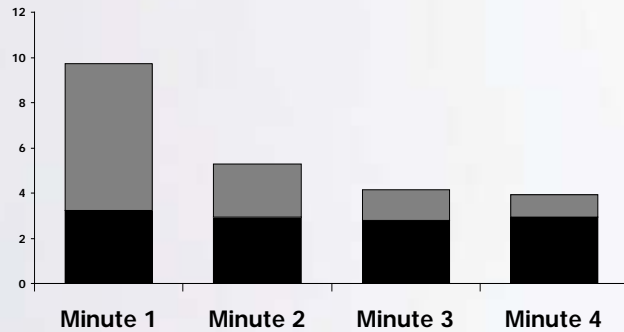


# Play Back of Commercials: Mostly In First Minutes

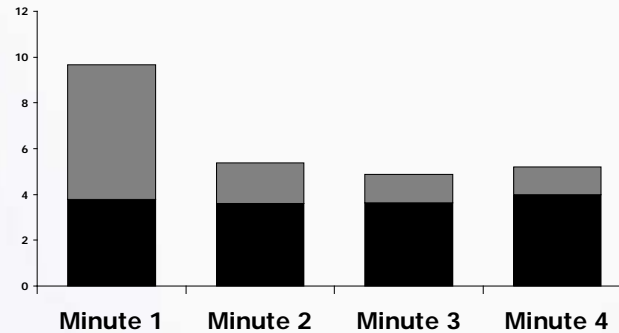
## A18-49 in DVR HH

Average C3 Rating

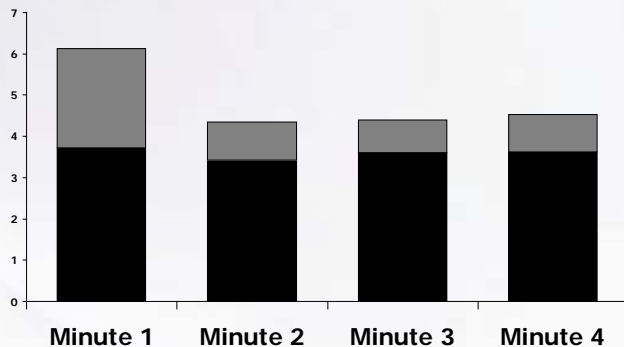
House - FOX



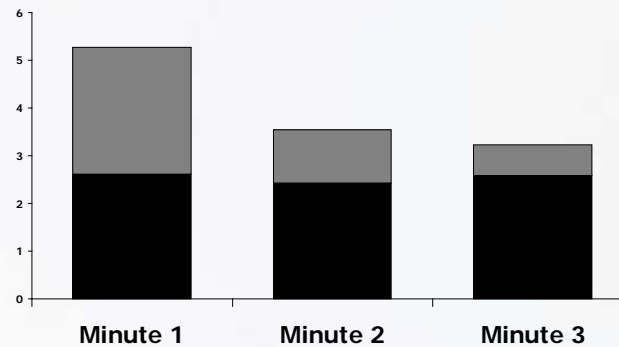
Grey's Anatomy - ABC



Two and A Half Men - CBS



30 Rock - NBC

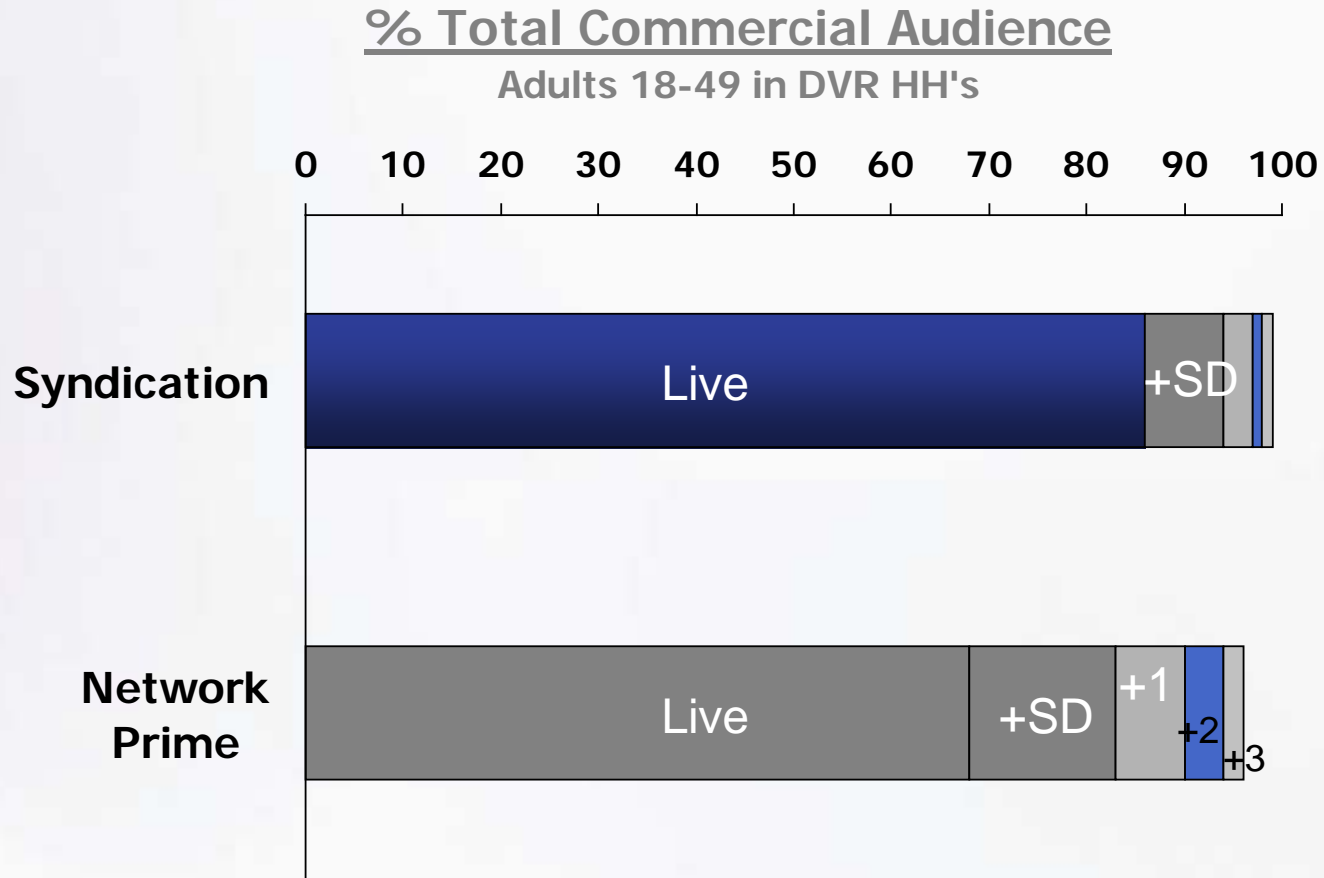


- Syndication's short breaks account for its 74% playback on the previous slide
- Long network breaks lower commercial playback in minutes two three and four of breaks



■ Commercial Live ■ Commercial Playback

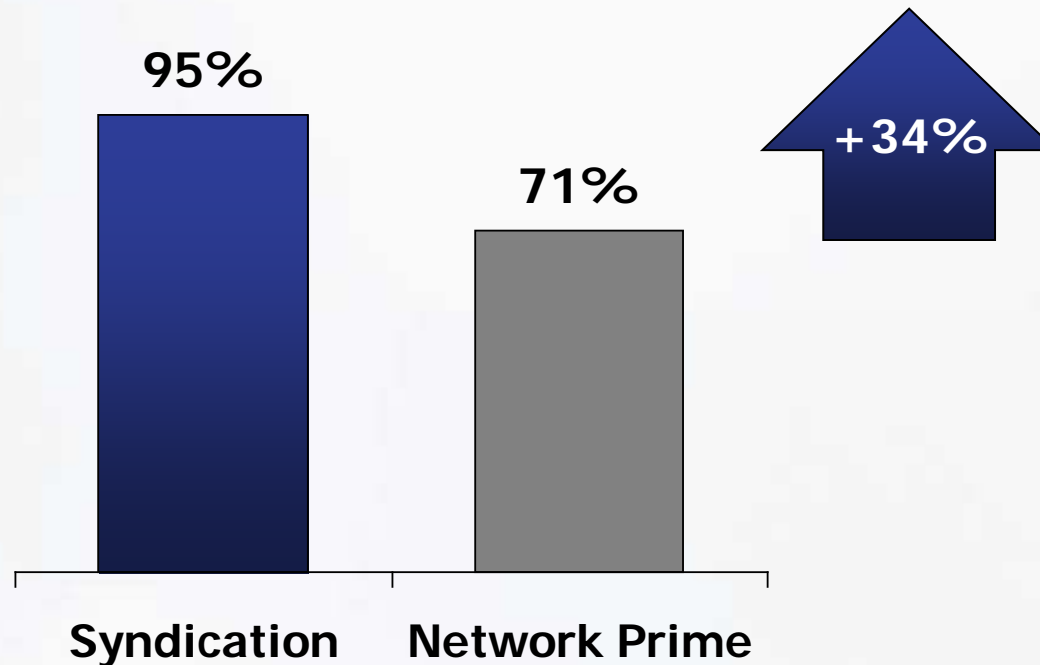
# Syndication: Commercial Delivery When You Need It



# Syndication's Viewers Stay Through The Commercials

## C3 Rating to Program Rating

Adults 18-49 in DVR HH's





**Syndicated Television:**  
*Great Programs, Great Value*